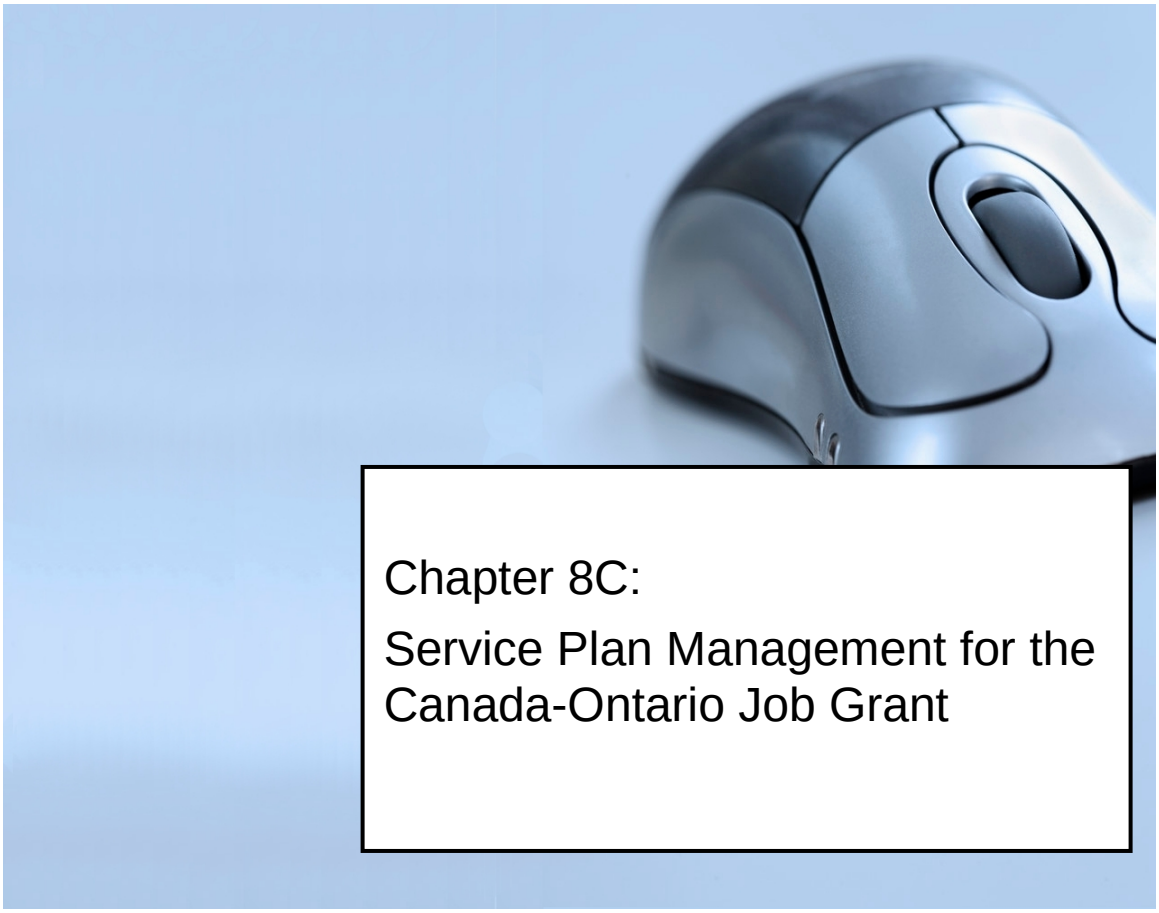
EOIS Case Management System
Service Provider User Guide



Chapter 8C:

Service Plan Management for the Canada-Ontario Job Grant

Version: 1.1

March 2015

Document History

Version #	Date	Description
1.0	November, 2014	Initial version released with the launch of EOIS-CaMS Release 4.2.
1.1	March 2015	Updated to include changes related to EOIS-CaMS Releases 4.3 and 4.4, including the addition of 8.17 Reviews.

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8 Service Plan Management for the Canada-Ontario Job Grant

8.1 Introduction

Note: this chapter deals exclusively with Canada-Ontario Job Grant service plans. For Employment Service and Summer Jobs Service plans, refer to Chapter 8A. For Literacy and Basic Skills (LBS) service plans, refer to Chapter 8B.

Employment Ontario service providers create road maps or plans for individuals that detail the benefits and services that the service provider can deliver in order to meet clients' needs. Employment Ontario refers to this type of plan as a service plan. The service plan is a system tool that allows an Employment Ontario service provider to plan and manage the delivery of services and activities to help a client achieve a specific goal.

The primary reason for the creation of any service plan is to enable a client to achieve a specific goal. In most cases, a goal must be divided into steps that need to be attained in order to achieve the overall plan goal.

Building these steps individually provides a more manageable way of achieving the overall service plan goal. A case worker will have the ability to track all client participation, identifying any failure on behalf of the client to meet the required objectives. In this way, the service provider can measure the efficiency of both the client and the overall service plan.

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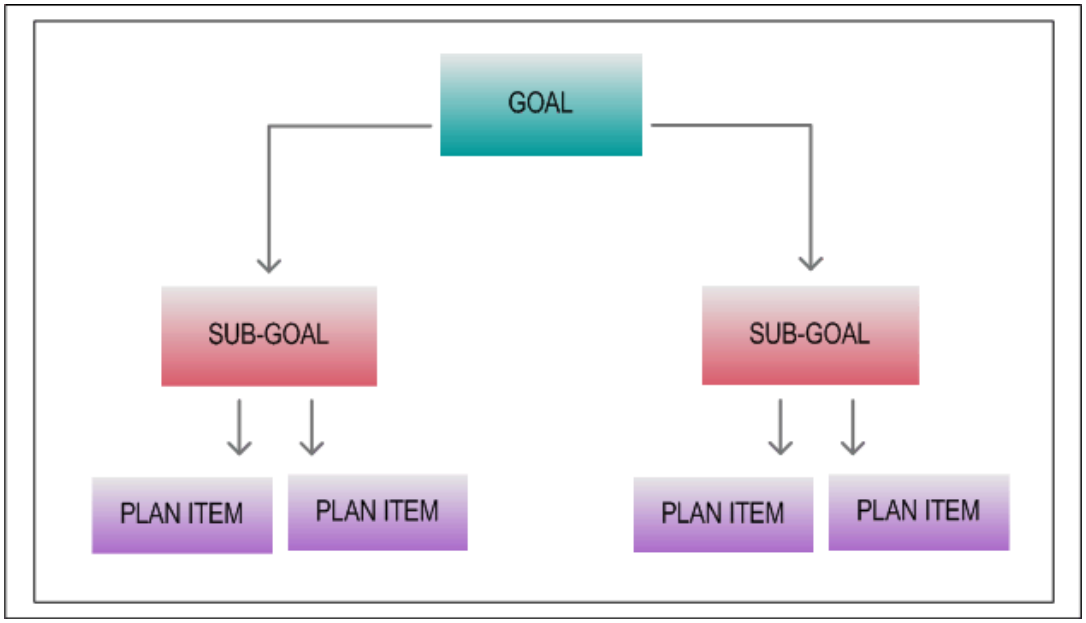
8.2 Service Plan Structure

The service plan includes one goal for the overall service plan, one or more sub-goals, and one or more plan items for each sub-goal.



8.2.1 Goal

The goal is the primary objective or desired outcome of the service plan, which the client is working towards. For example, the Employment Service (ES) service plan goal is “Sustainable Employment.”

8.2.2 Sub-Goals

The goal can be broken down into a series of more manageable steps, the aim of which are to assist the client in achieving the overall goal. These steps are known as sub-goals, which will typically consist of one or more scheduled activities or plan items. The successful completion of some or all plan items is required to successfully attain a sub-goal.

The ES service plan sub-goals are:

- Job Search
- Job Matching, Placement and Incentives
- Job Retention

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8.2.3 Plan Items

Plan items are the fundamental building blocks of a service plan. They are the benefits, services, and activities that are added to a sub-goal in order to achieve the plan goal. Plan items can be configured with cost, outcome and start and end dates.

8.3 Employer and Participant COJG Service Plans

For the Canada-Ontario Job Grant, employers are the “client” for the program. A service plan is required for the employer as well as all training participants (existing and new employees of the employer). The participant service plans are linked to their associated employer service plan.

8.4 Service Plan Template

The Ministry has created service plan templates based on the relevant program or service guidelines. The templates include a predefined set of sub-goals, which include plan items. Service providers must use these templates when creating service plans; however, a service plan created from a template can still be customized to meet the individual requirements of a specific client, thus providing even greater flexibility.

8.4.1 Client Summary

A client summary is a mandatory element for each service plan and it captures details that are unique to the client.

8.4.2 Plan Summary

A plan summary is a mandatory element for each service plan and it details the activities that the client agrees to undertake to achieve their service plan goal. It reflects the structure of the plan and shows all activities listed under it. The plan summary may be printed for and accepted by the client but is not a binding agreement.

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8.5 Roles and Responsibilities

The creation and management of service plans is the responsibility of service providers. Ministry users with appropriate system access may view, plan but cannot create or modify service plans. The following table lists the actions that each system user role can perform.

Role	Search /View Service Plan	Create Service Plan	Modify Service Plan	Close Service Plan
Service Provider Manager	✓	✓	✓	✓
Service Provider Caseworker	✓	✓	✓	✓
Service Provider Administrator	✓	✓	✓	✓
Ministry Supervisor	✓			
Ministry Caseworker	✓			
Ministry Admin Support	✓			

8.6 Building a Service Plan

The successful creation of a service plan requires the following steps to be performed in sequence and will be explained in this section.

1. Create a service plan from a template
2. Create a client summary
3. Add additional sub-goals (if required)
4. Add plan items to sub-goal(s)
5. Submit service plan for approval
6. Create plan summary
7. Record acceptance of plan summary

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8.7 COJG Process Flow in EOIS-CaMS

The following nine steps represent the process flow for COJG applications after the online application has been approved in EOIS-CaMS:

1.) Register Employer
2.) Create Employer EO Case
3.) Create Employer COJG service plan
4.) Register Participant(s)
5.) Create Participant COJG service plan(s)
6.) Maintain both Participant and Employer service plans
7.) Closure of Participant service plan(s)
8.) Closure of Employer service plan
9.) Reviews/Follow-ups for both Employer and Participant(s)

	Please note Steps 1 – 5 **must** be completed in the above order. Data from the COJG application is pre-populated in EOIS-CaMS to save data entry time as the user progresses through these steps. Skipping or reordering steps will produce system error messages.

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8.8 Create Employer Service Plan

Prerequisite

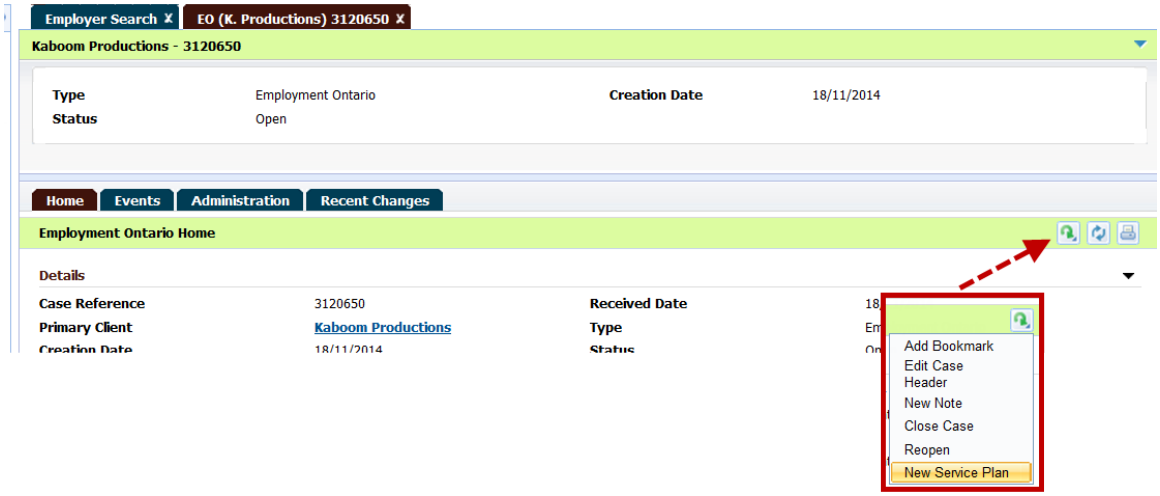
The Employment Ontario Case **for the employer** must exist in order to create a service plan for a client. If one does not exist, refer to Chapter 7 for instructions on how to create an Employment Ontario Case.

For information on how to find an Employment Ontario Case within the system, refer to Case Search in Chapter 2.

System Steps

➲ **Step 1:** *Employment Ontario Home*

Click New Service Plan from the **Action Button**.



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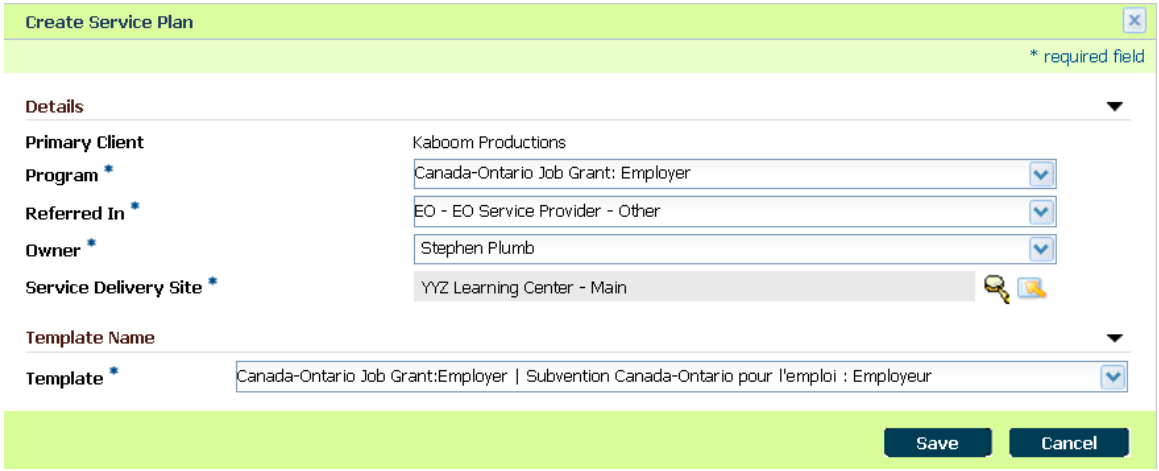
➲ **Step 2:** *Create Service Plan*

Complete all fields. For the **Service Delivery Site**, click on the magnifying glass icon and select the appropriate **Service Delivery Site Name**. The **Service Delivery Site** will populate on to the *Create Service Plan* page. For **Program**, select "Canada-Ontario Job Grant: Employer" and that determines the relevant choice available for the **Template**. Click Save.



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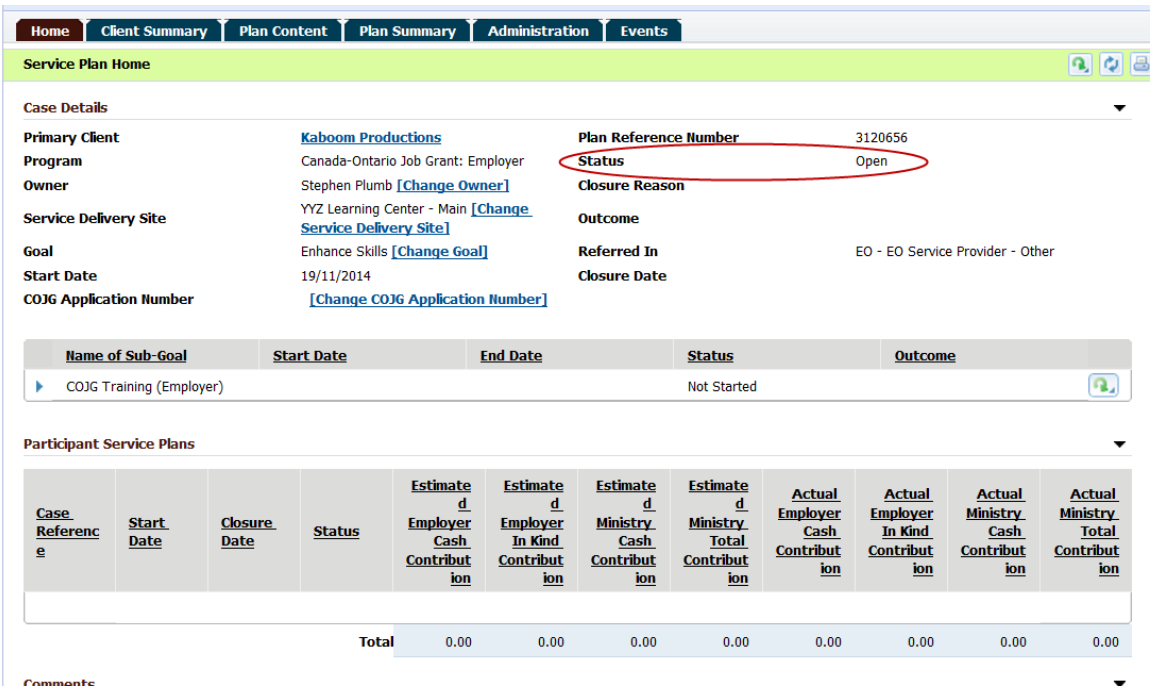
➲ Step 3: *Service Plan Home*

Ensure that all information in the service plan is correct.

Once a service plan has been created the status will be set to “Open;” this appears on the *Service Plan Home* page. A service plan can have various statuses. For a detailed description of status definitions and *Service Plan Home* page features, refer to the Appendix.

	If **Referred In** requires modifying, click Edit Service Plan from the **Action Button** on the *Service Plan Home* page.



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8.8.1 Link to COJG Application

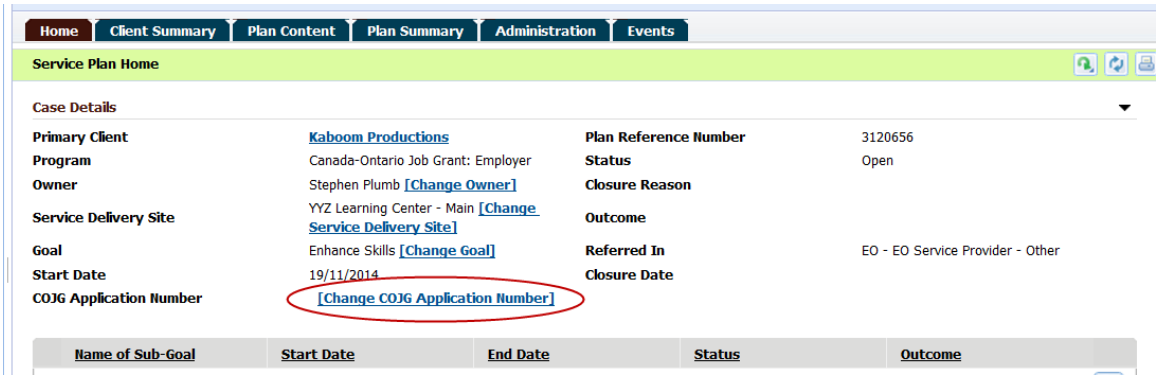
A user **MUST** associate a **COJG Application ID** to the COJG Employer service plan before proceeding to the next step in the service plan process flow.

	If a user has not linked a **COJG Application ID** to the COJG Employer service plan, data will not be populated from the online application form.

System Steps

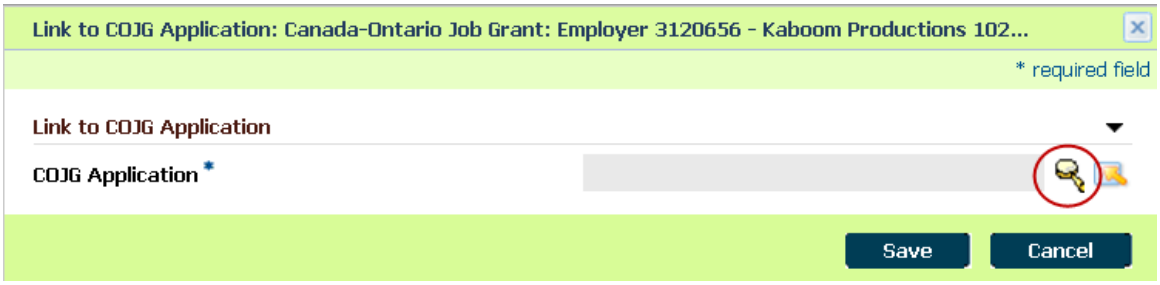
➲ **Step 1:** *Service Plan Home*

Click Change COJG Application Number.



➲ **Step 2:** *Link to COJG Application: Canada-Ontario Job Grant*

For the **COJG Application**, click on the magnifying glass icon .


Link to COJG Application: Canada-Ontario Job Grant: Employer 3120656 - Kaboom Productions 102...
* required field
Link to COJG Application
COJG Application *
Save
Cancel

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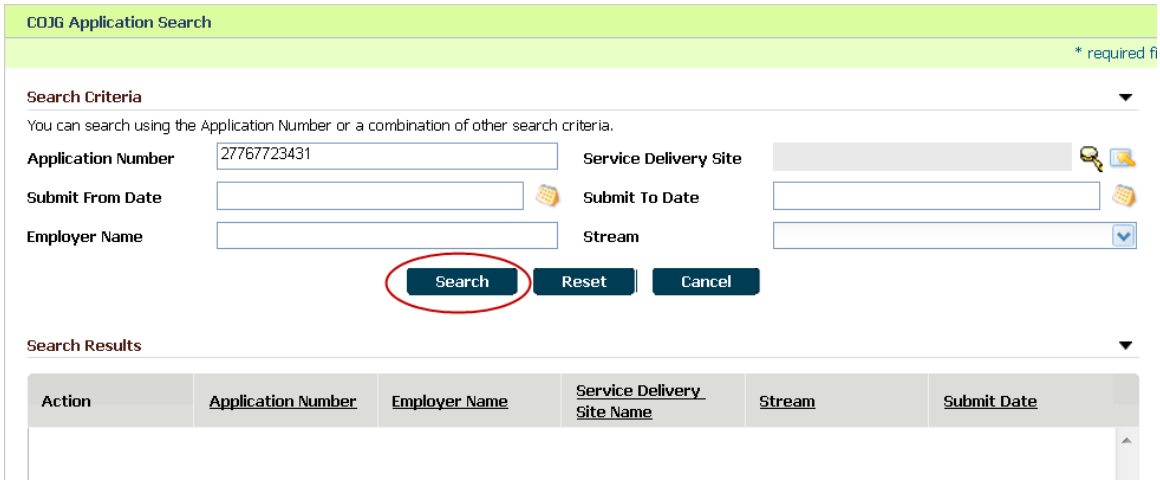
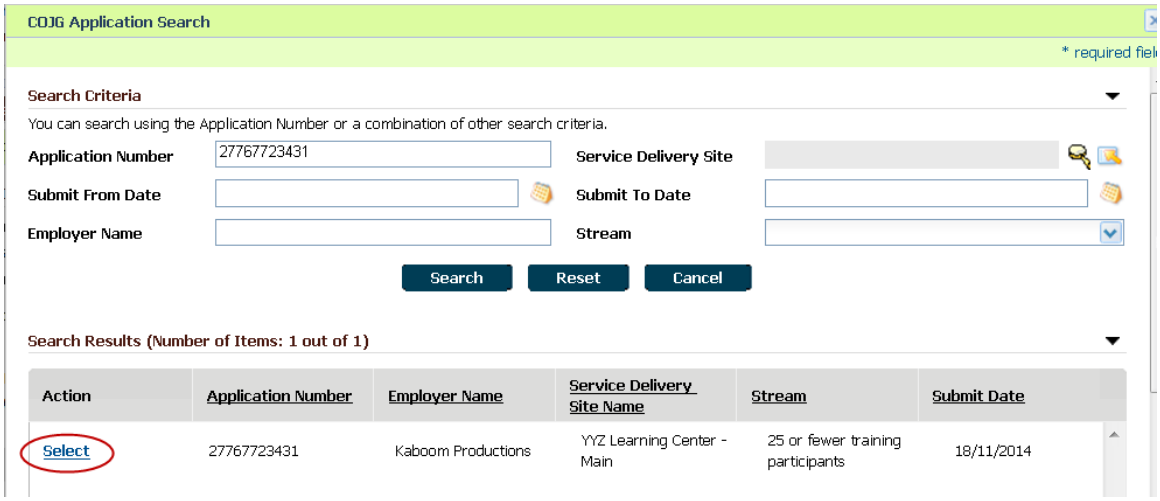
➲ **Step 3:** *COJG Application Search*

Enter search criteria and click Search.



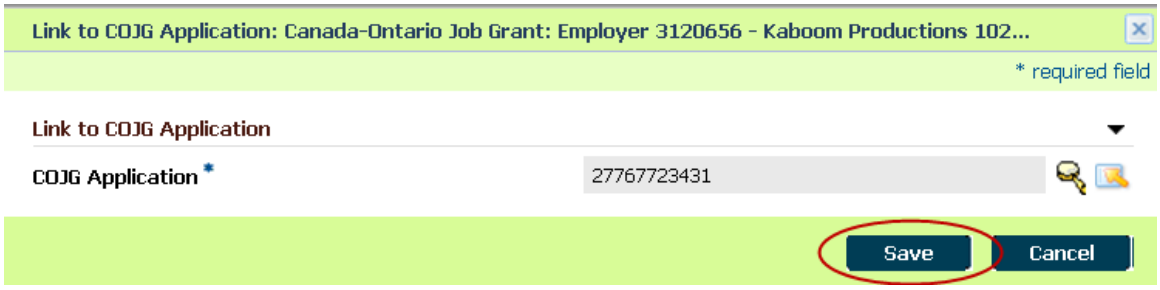
➲ **Step 4:** *COJG Application Search*

Click Select next to the appropriate record in the search results.



➲ **Step 5:** *Link to COJG Application: Canada-Ontario Job Grant*

Click Save.



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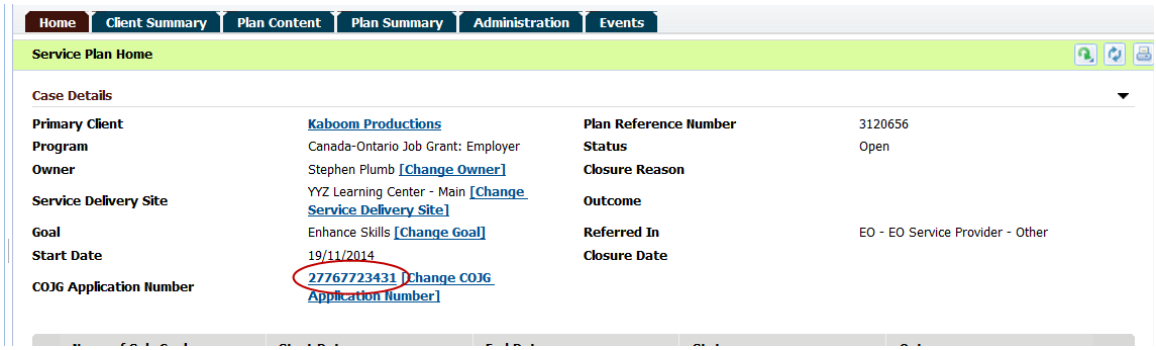
➲ **Step 6:** *Service Plan Home*

The **COJG Application Number** appears on the *Service Plan Home* page.



	Once a COJG application number has been linked to an employer service plan, it cannot be associated with another service plan, have its **Status** changed, or be forwarded unless it is later "unlinked."

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8.8.2 Create Client Summary for COJG Employer

	Only one client summary can be created per service plan. Please note that the client summary can be modified, but a new one cannot be created.

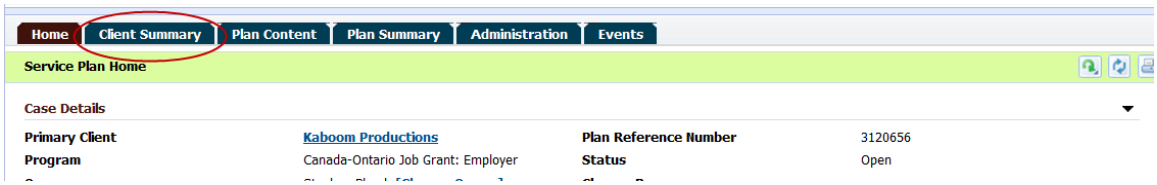
Prerequisite

A **COJG Application Number** is recorded on the *COJG Employer Service Plan Home* page.

The *Client Summary* for a COJG Employer service plan has an added vertical navigation feature, the **Tab Content Bar**.

➲ **Step 1:** *Service Plan Home*

Click the **Client Summary** tab.



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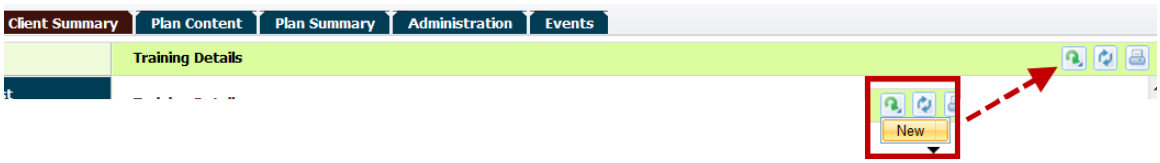
➲ **Step 2:** *Client Summary*

Click New, which in some instances is found in the **Action Button**).



When a user clicks New within any section of the *Client Summary*, data from the COJG Online Application pre-populates into various fields. This allows the user to review the data (making sure all fields are up-to-date) and make any modifications that may be necessary.

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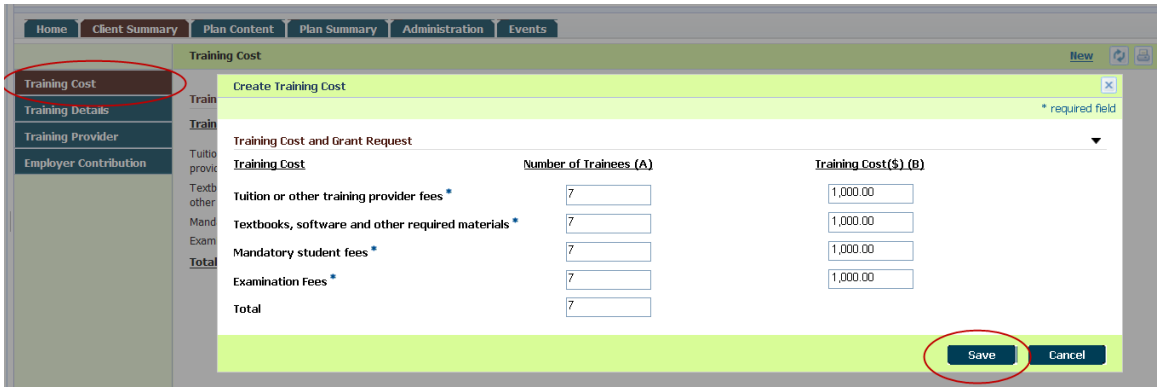
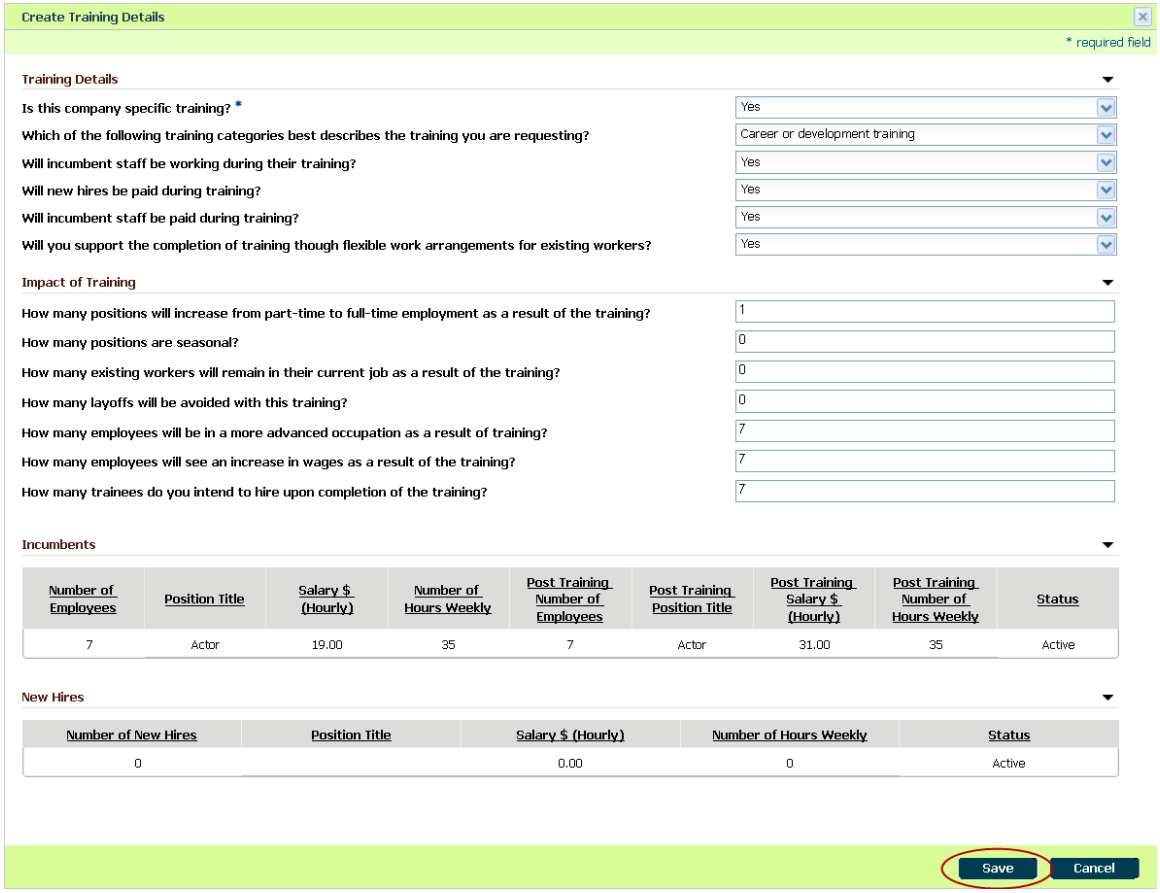
➲ **Step 3:** *Create Client Summary*

Complete all fields, and click Save.

Training Cost



Training Details


Create Training Details
* required field
Training Details
Is this company specific training? *
Yes
Which of the following training categories best describes the training you are requesting?
Career or development training
Will incumbent staff be working during their training?
Will new hires be paid during training?
Will incumbent staff be paid during training?
Will you support the completion of training though flexible work arrangements for existing workers?
Impact of Training
How many positions will increase from part-time to full-time employment as a result of the training?
1
How many positions are seasonal?
0
How many existing workers will remain in their current job as a result of the training?
How many layoffs will be avoided with this training?
How many employees will be in a more advanced occupation as a result of training?
7
How many employees will see an increase in wages as a result of the training?
How many trainees do you intend to hire upon completion of the training?
Incumbents
Number of Employees
Position Title
Salary $ (Hourly)
Number of Hours Weekly
Post Training Number of Employees
Post Training Position Title
Post Training Salary $ (Hourly)
Post Training Number of Hours Weekly
Status
7
Actor
19.00
35
31.00
Active
New Hires
Number of New Hires
Position Title
Salary $ (Hourly)
Number of Hours Weekly
Status
0.00
Active
Save
Cancel

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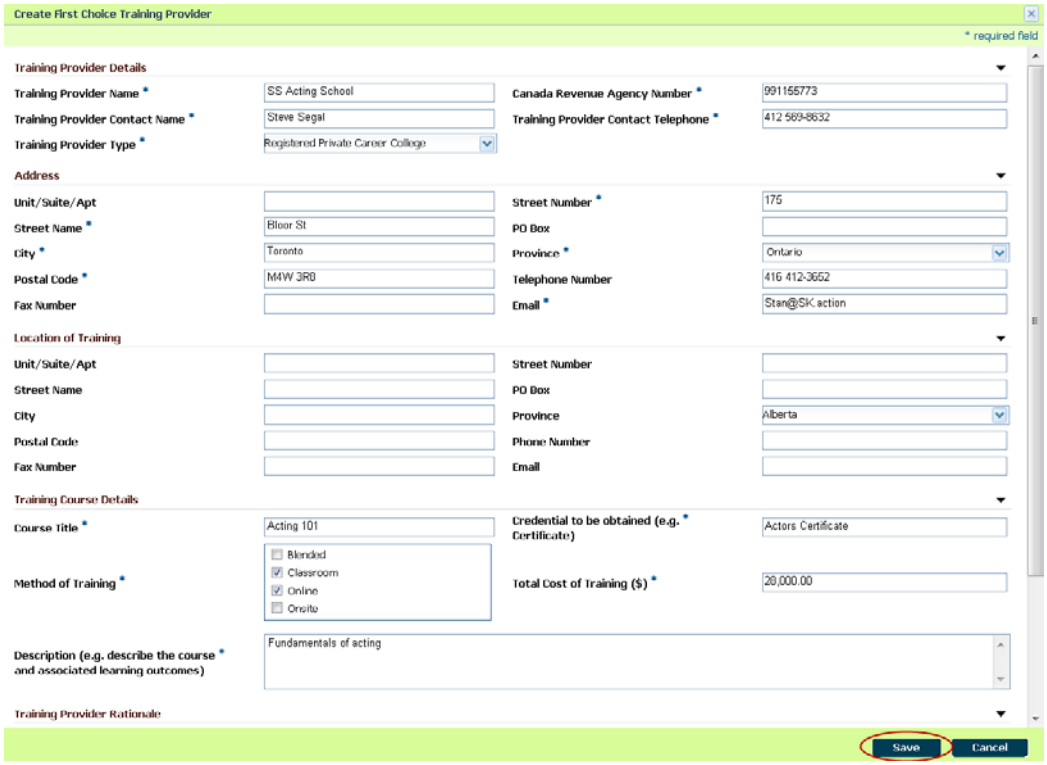
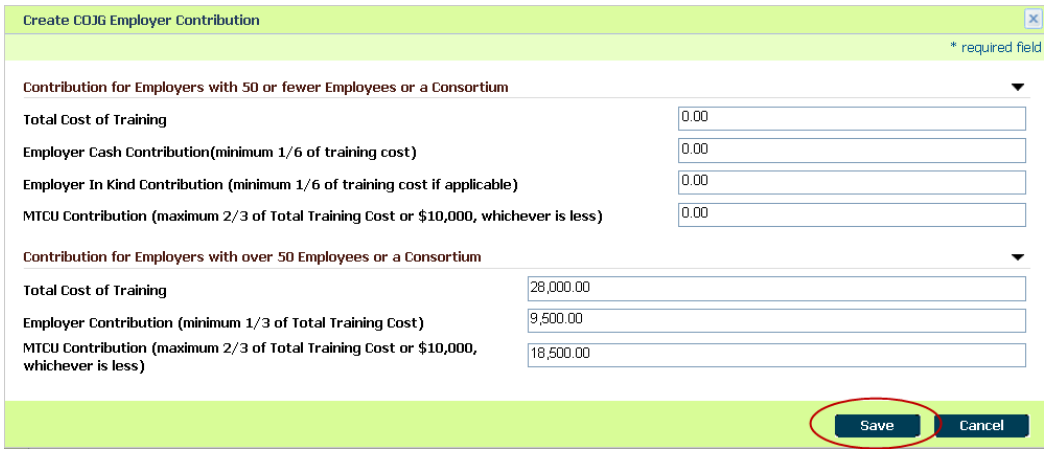
Training Provider



Employer Contribution


Create COJG Employer Contribution
* required field
Contribution for Employers with 50 or fewer Employees or a Consortium
Total Cost of Training
0.00
Employer Cash Contribution(minimum 1/6 of training cost)
0.00
Employer In Kind Contribution (minimum 1/6 of training cost if applicable)
0.00
MTCU Contribution (maximum 2/3 of Total Training Cost or $10,000, whichever is less)
0.00
Contribution for Employers with over 50 Employees or a Consortium
Total Cost of Training
28,000.00
Employer Contribution (minimum 1/3 of Total Training Cost)
9,500.00
MTCU Contribution (maximum 2/3 of Total Training Cost or $10,000, whichever is less)
18,500.00
Save
Cancel

	A user must manually Save each section within the **Tab Content Bar** to proceed to the next step of "Submitting for Approval" in the service plan process flow.

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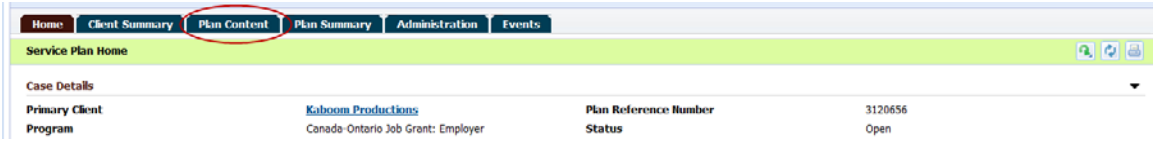
8.8.3 Add Sub-Goal for COJG Employer

	Adding a sub-goal is only required if the sub-goal has been deleted. When choosing the COJG employer service plan template, the sub-goal is automatically populated.

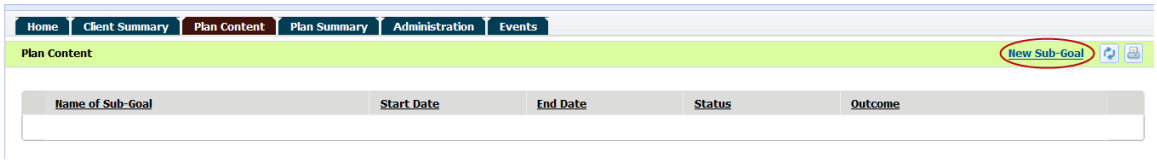
➲ **Step 1:** *Service Plan Home*

Click the **Plan Content** tab.



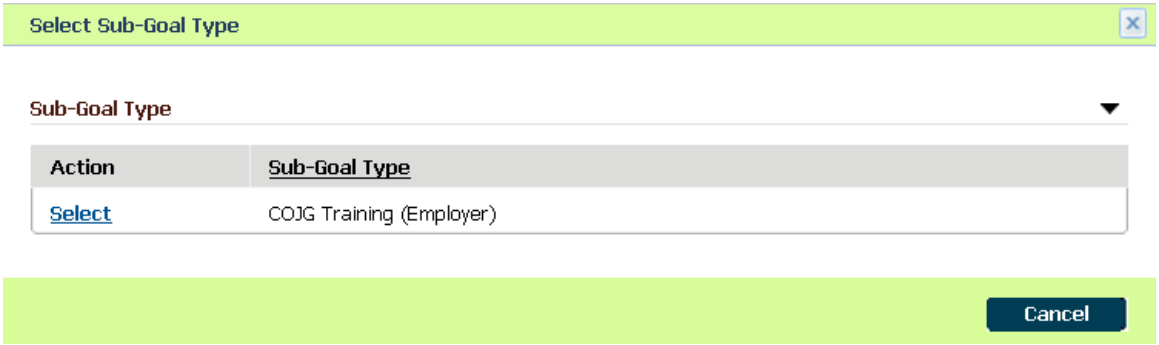
➲ **Step 2:** *Plan Content*

Click New Sub-Goal.



➲ **Step 3:** *Select Sub-Goal Type*

Click Select for the appropriate **Sub-Goal Type**.



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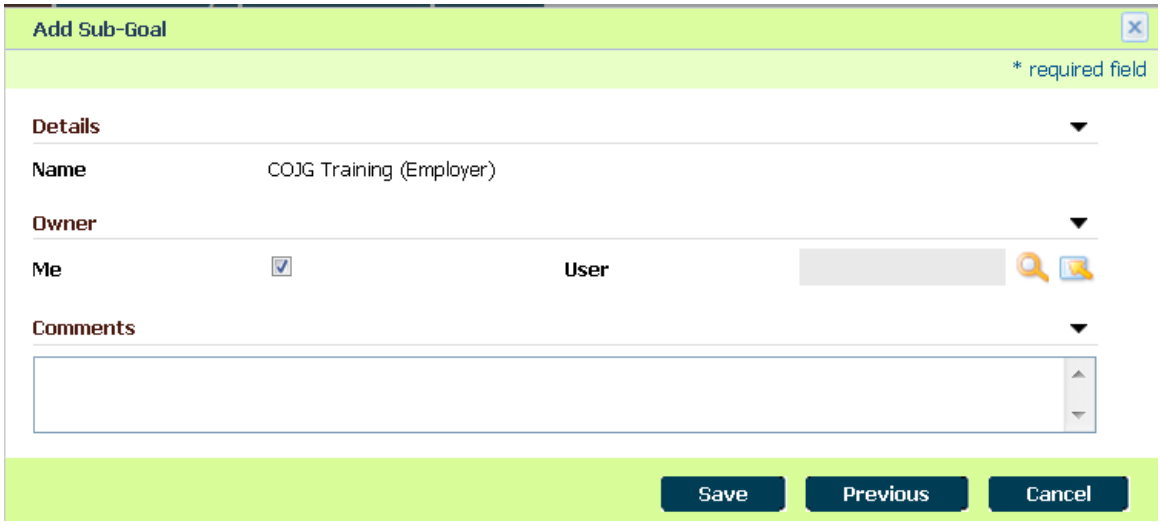
➲ **Step 4:** *Add Sub-Goal*

Click Save.



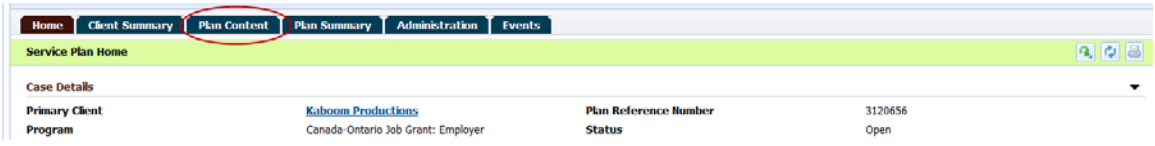
8.8.4 Add Plan Item for COJG Employer

For COJG employer service plans, there is only one plan item, *COJG Training Program*.

System Steps:

➲ **Step 1:** *Service Plan Home*

Click the **Plan Content** tab.



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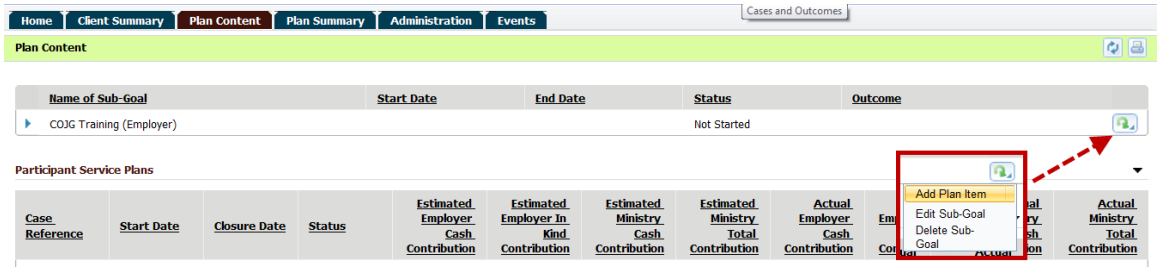
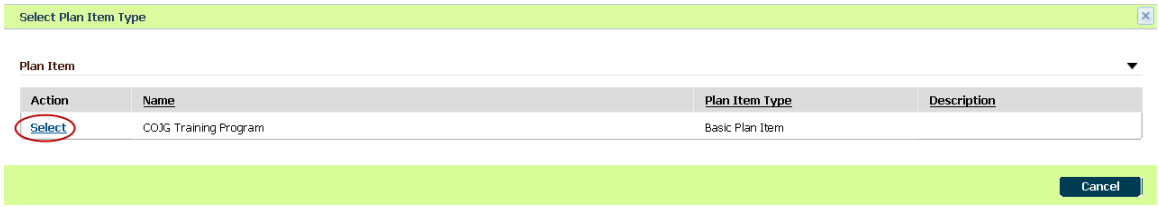
➲ Step 2: *Plan Content*

From the **Action Button** next to the appropriate sub-goal, select Add Plan Item.



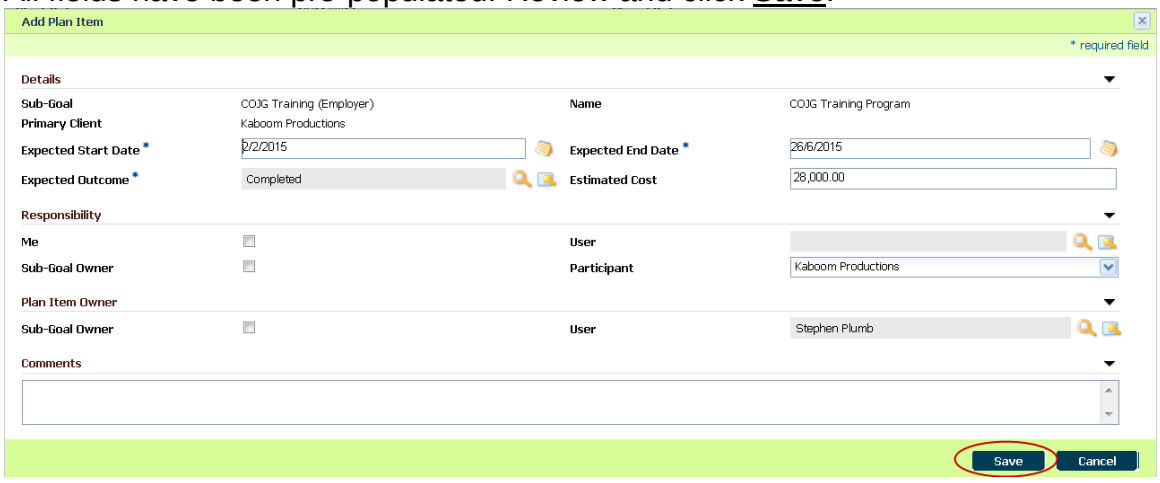
➲ Step 3: *Select Plan Item Type*

Click Select beside the appropriate **Plan Item**.



➲ Step 4: *Add Plan Item*

All fields have been pre-populated. Review and click Save.



	Do not edit the fields within the **Responsibility** and **Plan Item Owner** information panels. These fields default to the appropriate values.

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8.9 Create Participant Service Plan

	Each participant requires their own COJG participant service plan. There may be many COJG participant service plans linked to a single COJG employer service plan.

Prerequisite

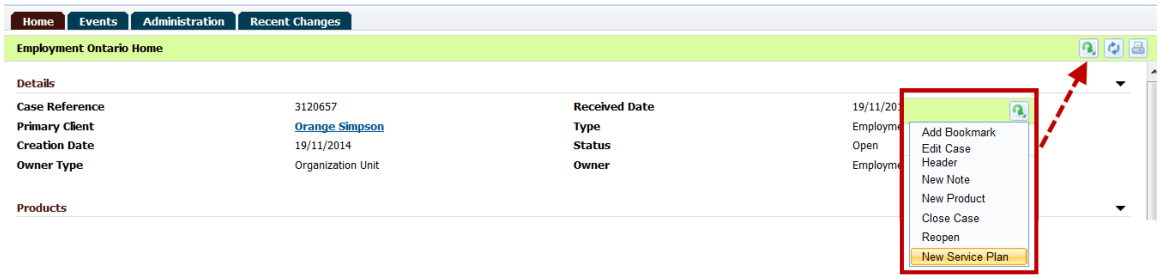
The Employment Ontario Case **for the participant** must exist in order to create a service plan for a client. If one does not exist, refer to Chapter 6 for instructions on how to create an Employment Ontario Case.

For information on how to find an Employment Ontario Case within the system, refer to Case Search in Chapter 2.

System Steps

➲ **Step 1:** *Employment Ontario Home*

Click New Service Plan from the **Action Button**.



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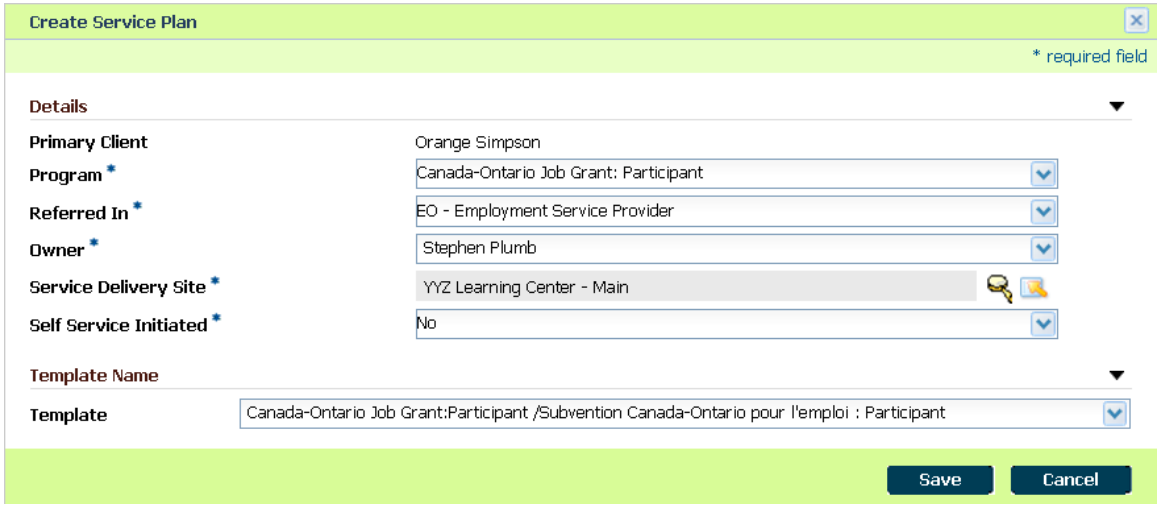
➲ Step 2: *Create Service Plan*

Complete all fields. For the **Service Delivery Site**, click on the magnifying glass icon and select the appropriate **Service Delivery Site Name**. The **Service Delivery Site** will populate on to the *Create Service Plan* page. For **Program**, select "Canada-Ontario Job Grant: Participant" and that determines the relevant choice available for the **Template**. Click Save.

	For **Self Service Initiated**, the value will always be **No** for COJG service plans.



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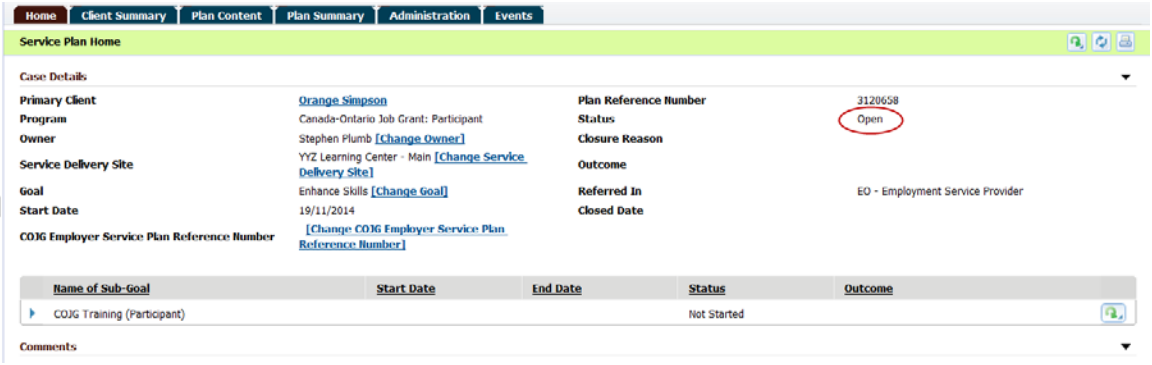
➲ Step 3: *Service Plan Home*

Ensure that all information in the service plan is correct.

Once a service plan has been created the status will be set to “Open;” this appears on the *Service Plan Home* page. A service plan can have various statuses. For a detailed description of status definitions and *Service Plan Home* page features, refer to the Appendix.

	If **Referred In** requires modifying, click Edit Service Plan from the **Action Button** on the *Service Plan Home* page.



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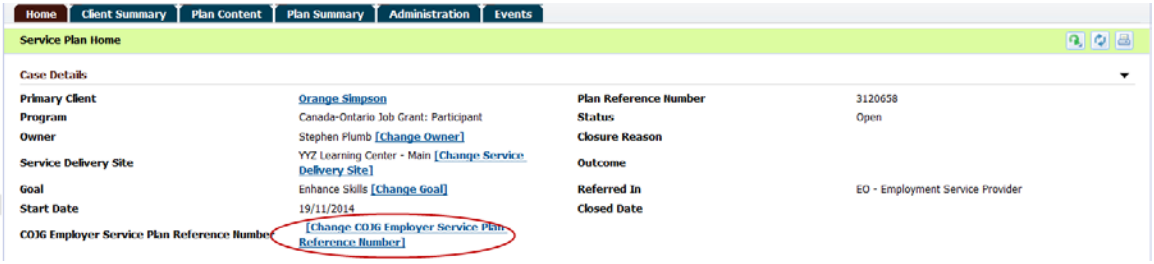
8.9.1 Link to COJG Employer Service Plan

A user **MUST** associate a **COJG Employer Service Plan Case Reference Number** to the COJG Participant service plan before proceeding to the next step in the service plan process flow. This linkage creates system generated items within the associated COJG Employer Service Plan.

System Steps

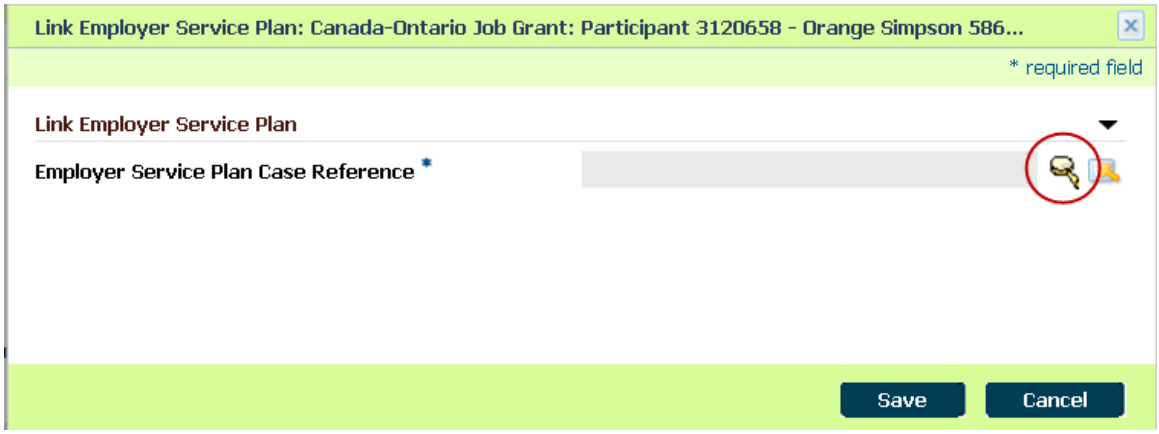
➲ **Step 1:** *Service Plan Home*

Click Change COJG Employer Service Plan Reference Number.



➲ **Step 2:** *Link Employer Service Plan Canada-Ontario Job Grant*

For **Employer Service Plan Case Reference**, click on the magnifying glass icon.


Link Employer Service Plan: Canada-Ontario Job Grant: Participant 3120658 - Orange Simpson 586...
* required field
Link Employer Service Plan
Employer Service Plan Case Reference *
Save
Cancel

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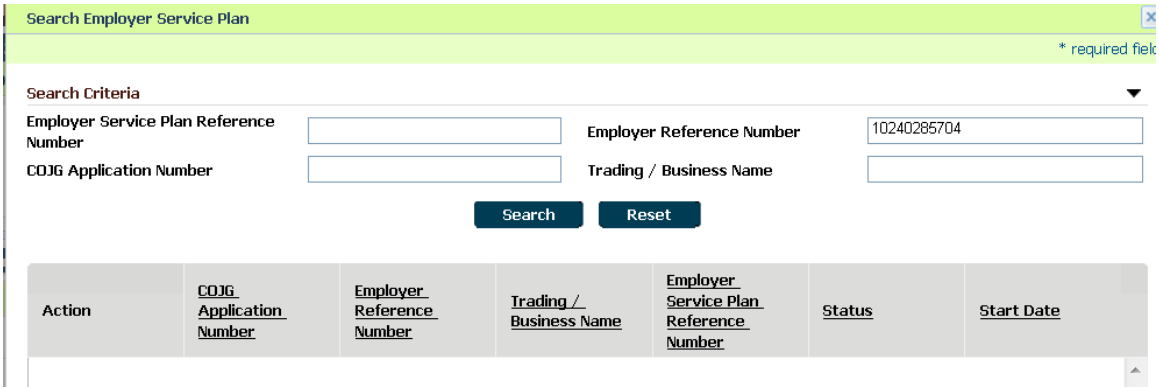
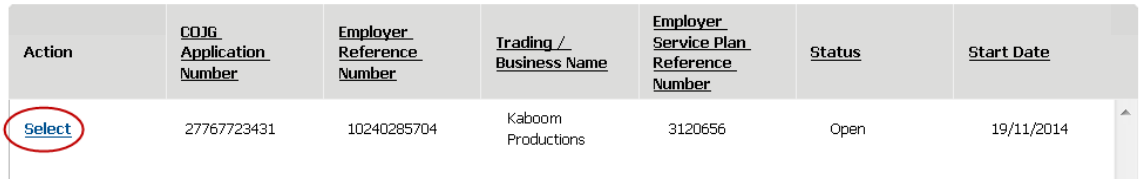
➲ **Step 3:** *Search Employer Service Plan*

Enter search criteria and click Search.



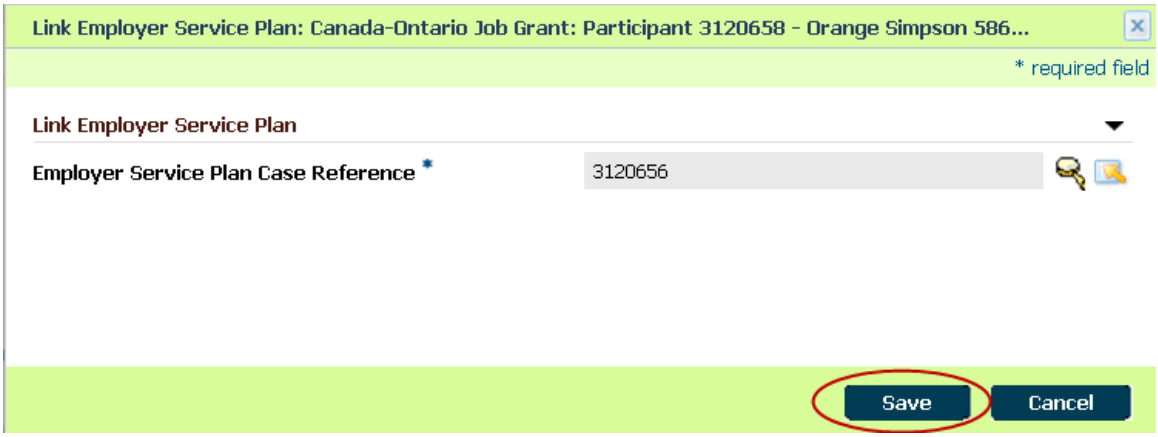
➲ **Step 4:** *Search Employer Service Plan*

Click Select next to the appropriate record in the search results.



➲ **Step 5:** *Link Employer Service Plan Canada-Ontario Job Grant*

Click Save.


Link Employer Service Plan: Canada-Ontario Job Grant: Participant 3120658 - Orange Simpson 586...
* required field
Link Employer Service Plan
Employer Service Plan Case Reference *
3120656
Save
Cancel

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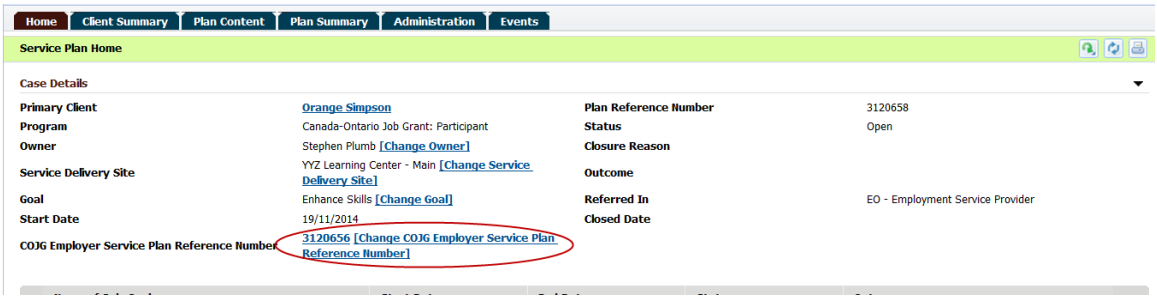
➲ Step 6: *Service Plan Home*

The **Employer Service Plan Case Reference** appears on the *Service Plan Home* page.



On the COJG employer *Service Plan Home* page, the COJG participant will appear in the **Participant Service Plans** list.

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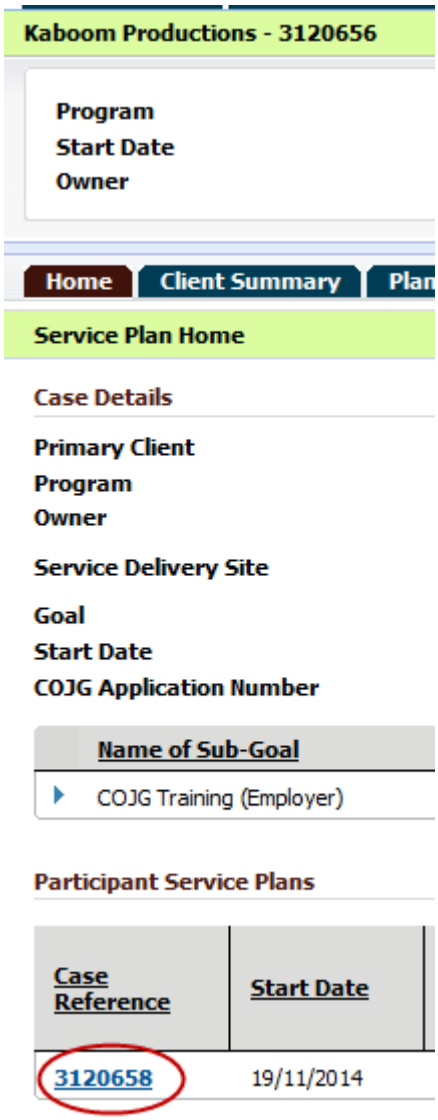

Note that the **Participant Service Plans** list excludes COJG participant service plan data under several scenarios:

- If the COJG participant service plan is closed with a **Closure Reason** of "Opened in Error," it does not display in the **Participant Service Plans** list.
- If the COJG participant service plan has a sub-goal with an **Outcome** of "Cancelled," all data related to the plan items associated to that sub-goal are not displayed and are excluded from the **Total** values.
- If the COJG participant service plan has a plan item with a status of "Cancelled" (i.e., deleted) or an **Outcome** of "Cancelled," all data related to the plan item are not displayed and are excluded from the **Total** values.

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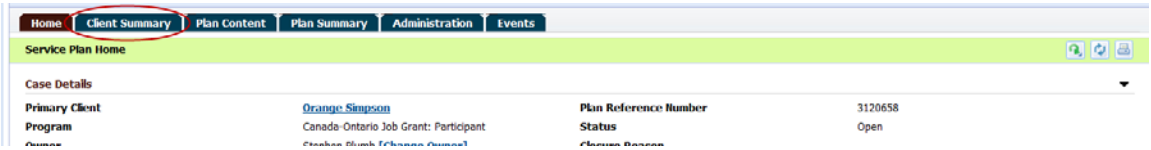
8.9.2 Create Client Summary for Participant

	Only one client summary can be created per service plan. Please note that the client summary can be modified, but a new one cannot be created.

System Steps:

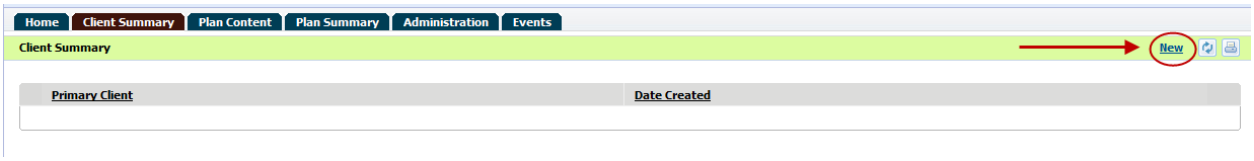
➲ **Step 1:** *Service Plan Home*

Click the **Client Summary** tab.



➲ **Step 2:** *Client Summary*

Click New.



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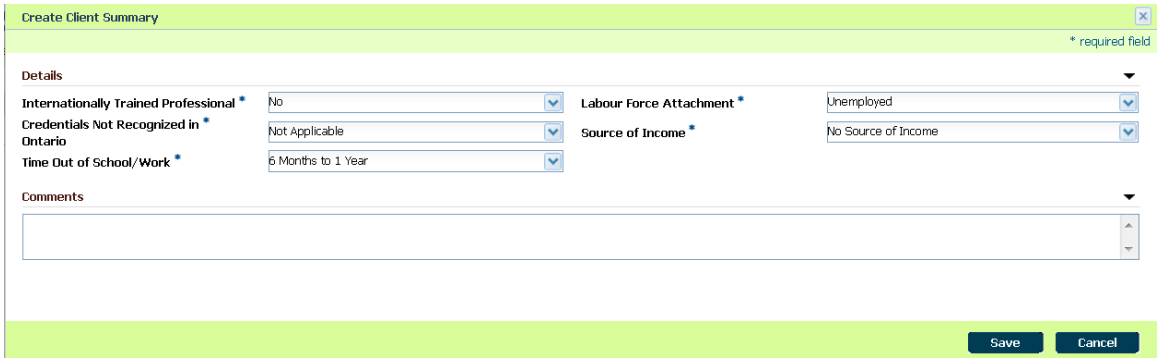
➲ **Step 3:** *Create Client Summary*

Complete all fields, and click Save.



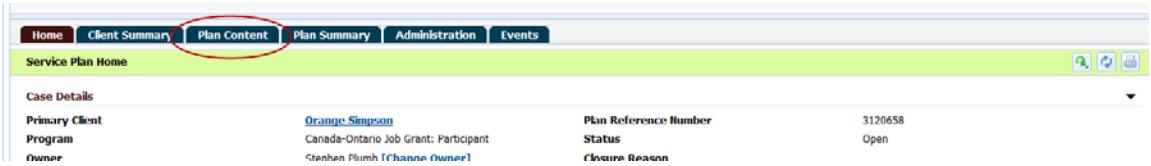
8.9.3 Add Additional Sub-Goal for COJG Participant

	When choosing the COJG participant service plan template, the *COJG Training (Participant)* sub-goal is automatically populated. An additional sub-goal (*COJG Placement and Support*) is required only for participants with a COJG placement.

System Steps:

➲ **Step 1:** *Service Plan Home*

Click the **Plan Content** tab.



➲ **Step 2:** *Plan Content*

Click New Sub-Goal.

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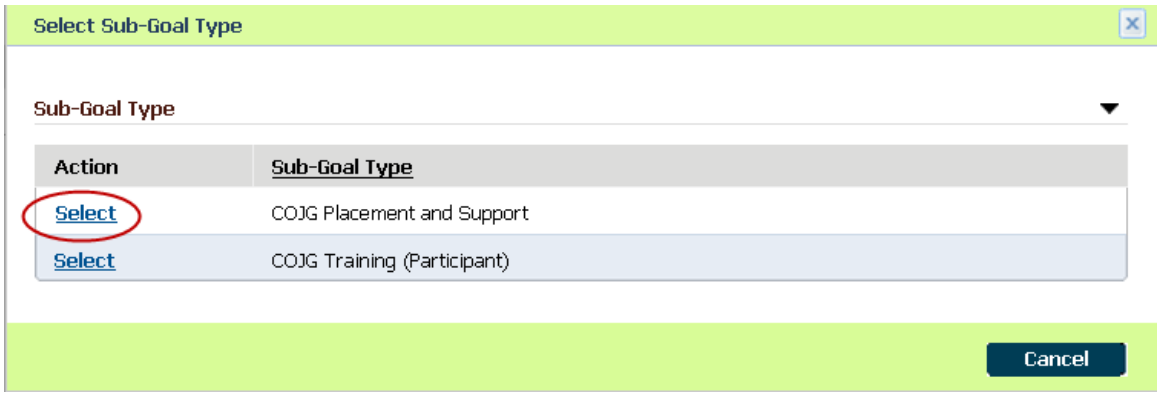
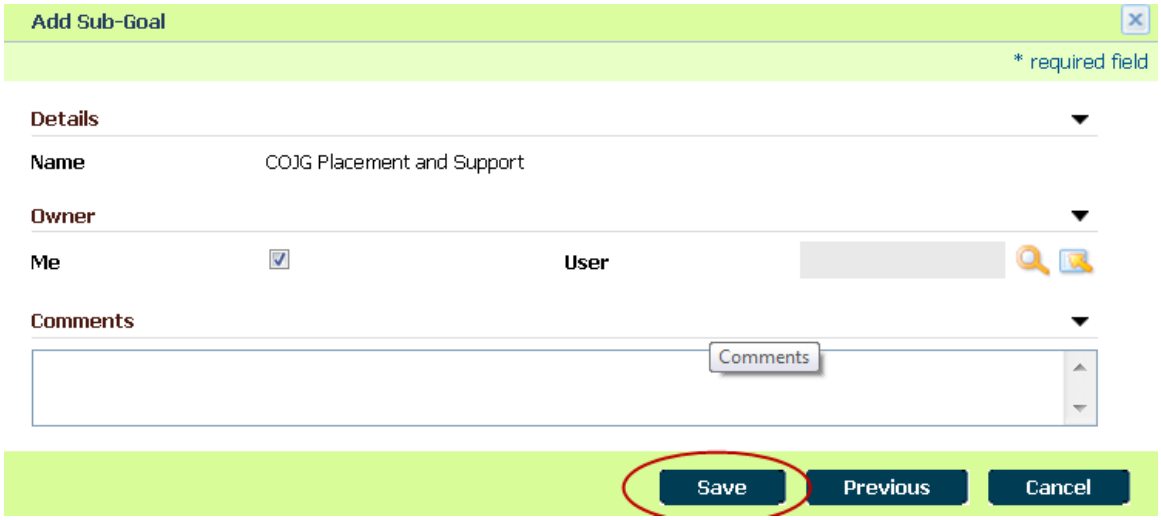
➲ **Step 3:** *Select Sub-Goal Type*

Click Select for the appropriate **Sub-Goal Type**.



➲ **Step 4:** *Add Sub-Goal*

Click Save.



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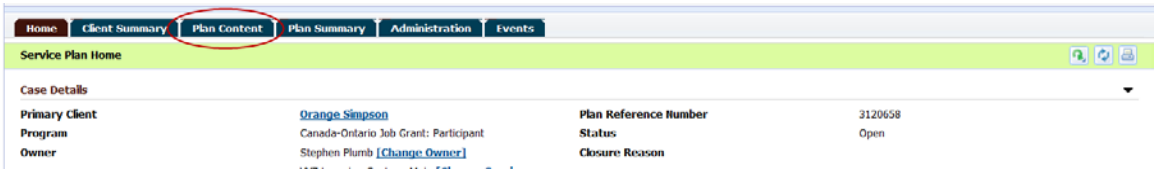
8.9.4 Add COJG Training Module Plan Item for COJG Participant

For COJG participant service plans, there is only one mandatory plan item, *COJG Training Module*.

System Steps:

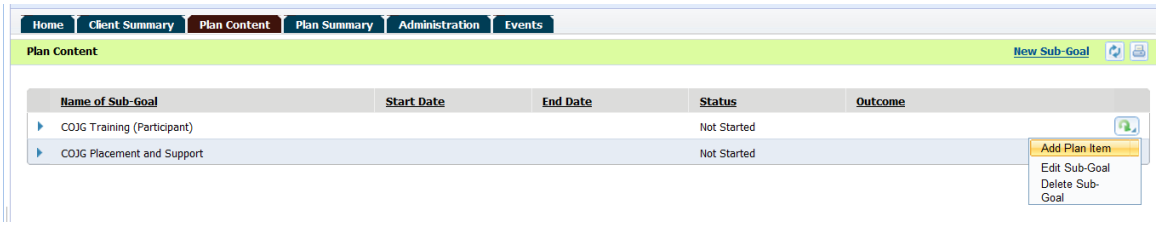
➲ **Step 1:** *Service Plan Home*

Click the **Plan Content** tab.



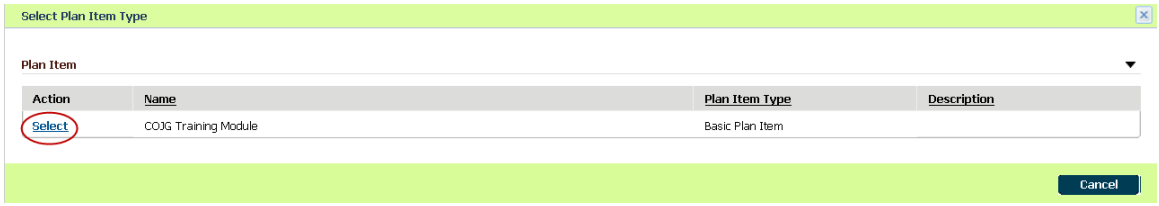
➲ **Step 2:** *Plan Content*

From the **Action Button** next to the appropriate sub-goal, select Add Plan Item.



➲ **Step 3:** *Select Plan Item Type*

Click Select beside the appropriate **Plan Item**.



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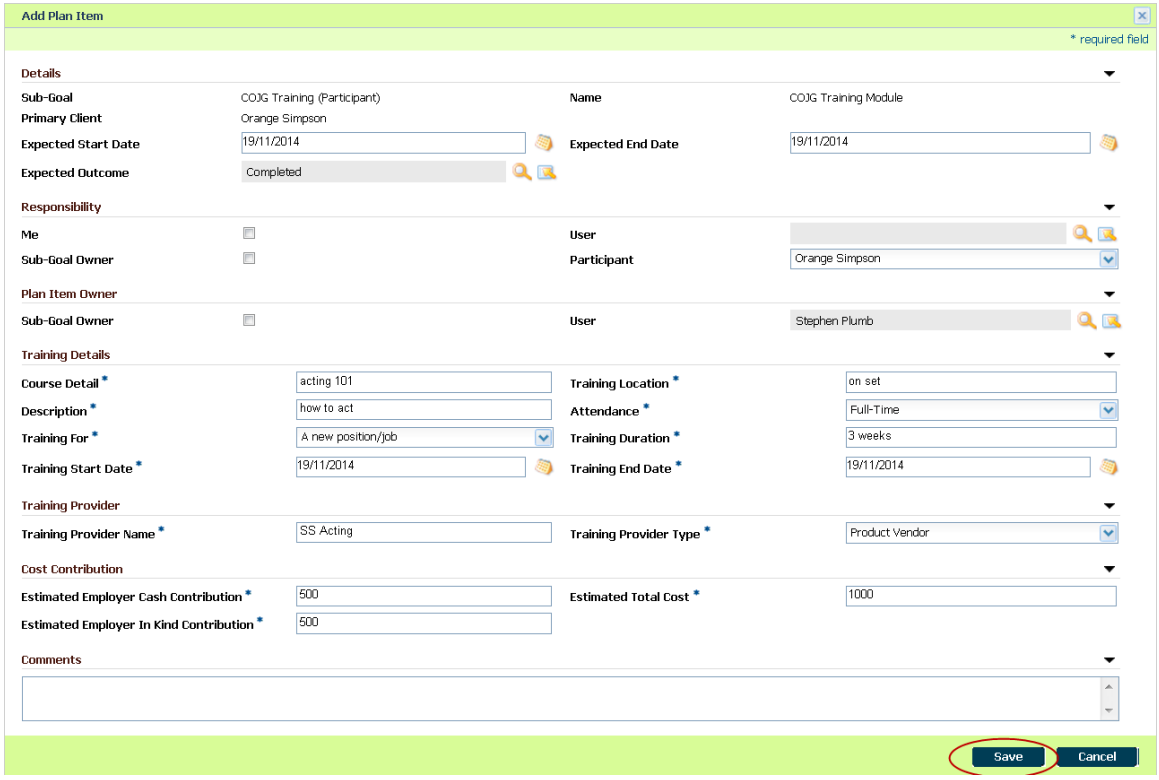
➲ Step 4: *Add Plan Item*

Some fields have been pre-populated. Complete remaining mandatory fields and click Save.



It is extremely important that users keep the **Estimated** and **Actual** fields for **Employer Cash Contribution**, **Employer In-Kind Contribution** and **Total Cost.** The data in these fields will be filtering into Service Provider and Ministry reports.

Do not edit the fields within the **Responsibility** and **Plan Item Owner** information panels. These fields default to the appropriate values.

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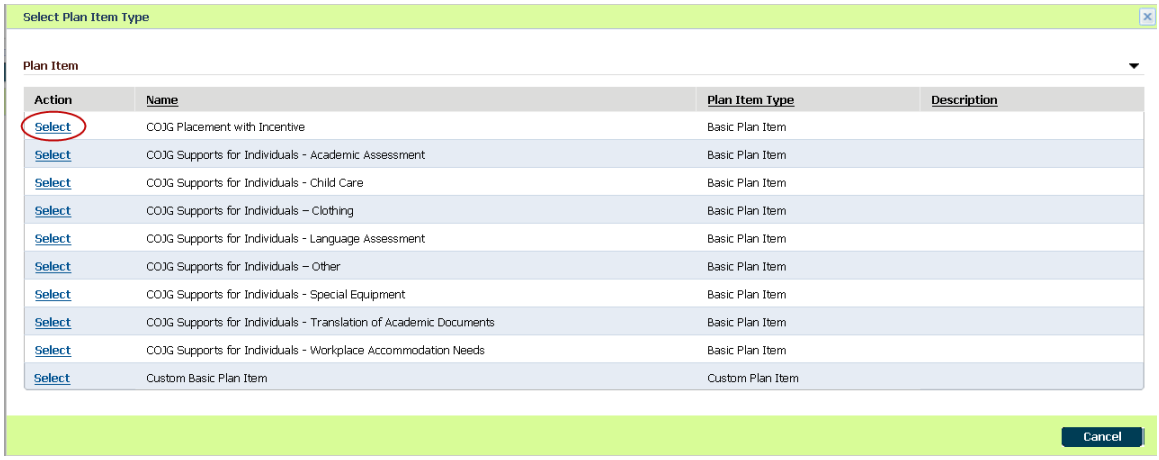
8.9.4.1 Add Plan Item (Placement for COJG Participant)

System Steps:

Follow steps 1 to 2 in Section 8.9.4.

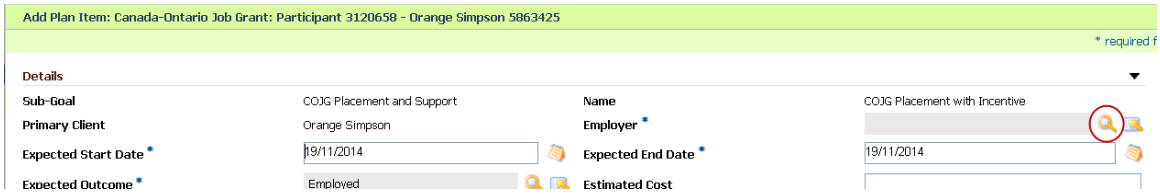
➲ **Step 3:** *Select Plan Item Type*

In the list of plan items associated with the **COJG Placement and Support** sub-goal, click Select next to **COJG Placement with Incentive**.



➲ **Step 4:** *Add Plan Item*

Click on the magnifying glass icon to conduct an Employer Search.



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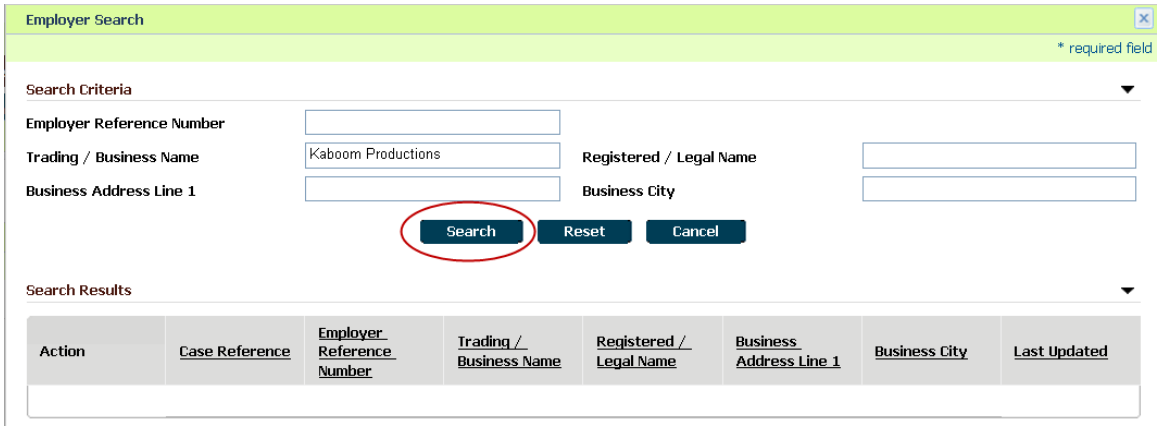
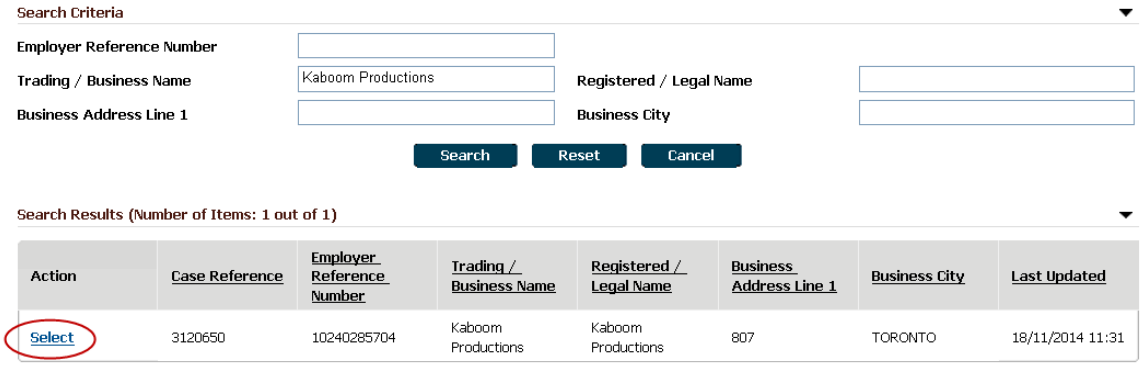
➲ Step 5: *Employer Search*

Complete the appropriate fields, and click Search.



➲ Step 6: *Employer Search*

Click Select beside the appropriate employer.



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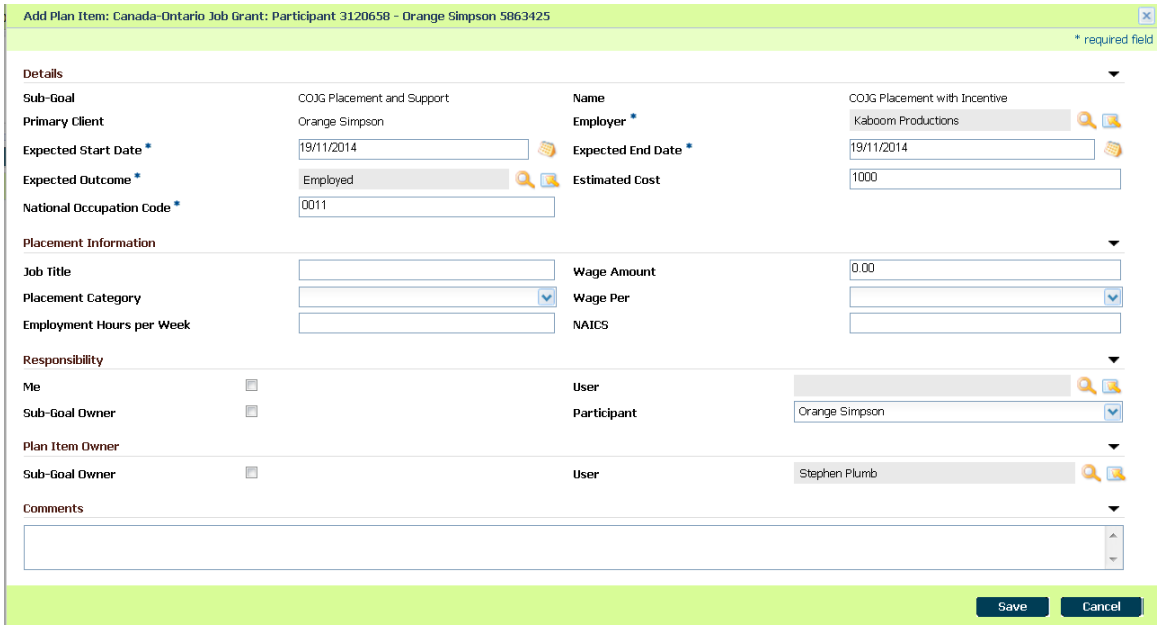
➲ Step 7: *Add Plan Item*

The **Employer** name will populate the *Add Plan Item* page. Complete fields as necessary. The **Expected Outcome** will pre-populate. For **Expected Start Date** and **Expected End Date**, if these dates have been defined, enter them; if not, use the default dates. Enter the **National Occupation Code (NOC)** relating to the placement, and the **Estimated Cost** that has been negotiated with the employer. Complete all the fields in the **Placement Information** panel, and click Save.

	Note that when the plan item has an **Outcome** of "Attained," the system will create a new employment record within the **Background** folder of the client profile. Modifications to this new record can only be made within the plan item. Also, this employment record will be set as the "Primary" record if one does not already exist for the client.



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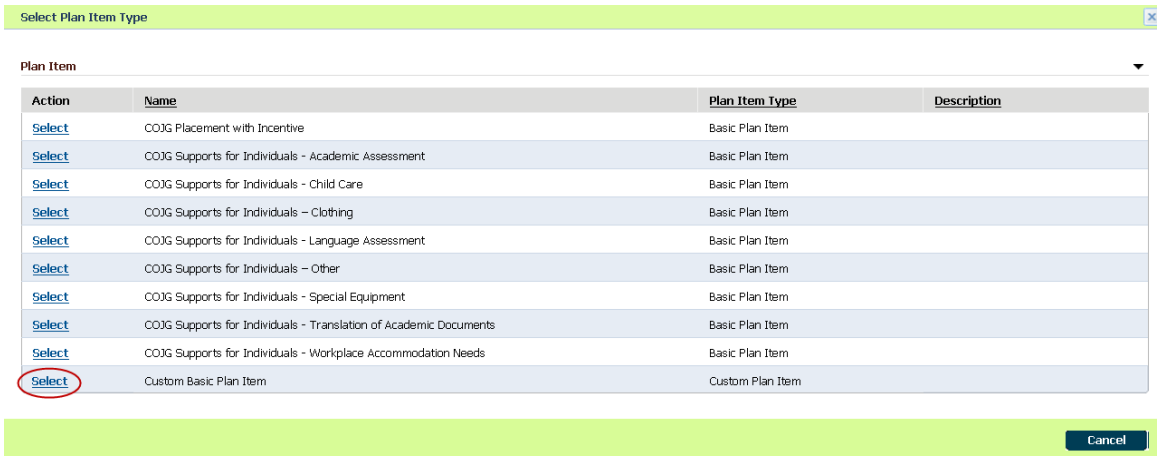
8.9.4.2 Add Plan Item (Custom Plan Item for COJG Participant)

Follow steps 1 to 2 in Section 8.9.4.

➲ **Step 3:** *Select Plan Item Type*

Under the **COJG Placement and Support** sub-goal, in the list of plan items, click Select next to Custom Basic Plan Item.



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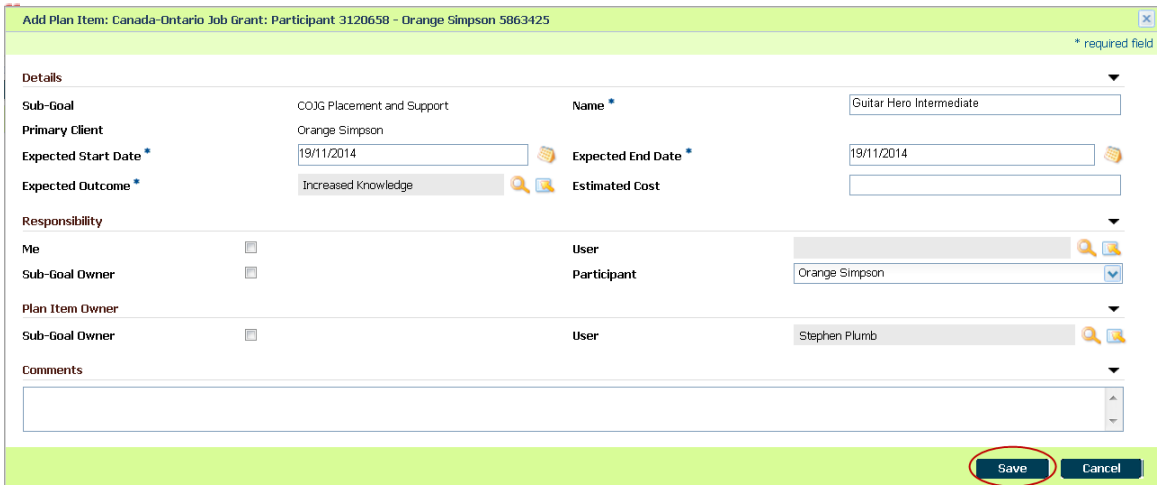
➲ Step 4: *Add Plan Item*

Complete fields as necessary. Unlike other plan item types, the **Name** is a free text field. For **Expected Outcome**, click on the magnifying glass icon and select the appropriate value. Once completed, the **Expected Outcome** will populate on the *Add Plan Item* page. For **Expected Start Date** and **Expected End Date**, if these dates have been defined, enter them; if not, use the default dates.



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8.10 Approval of COJG Employer Service Plan

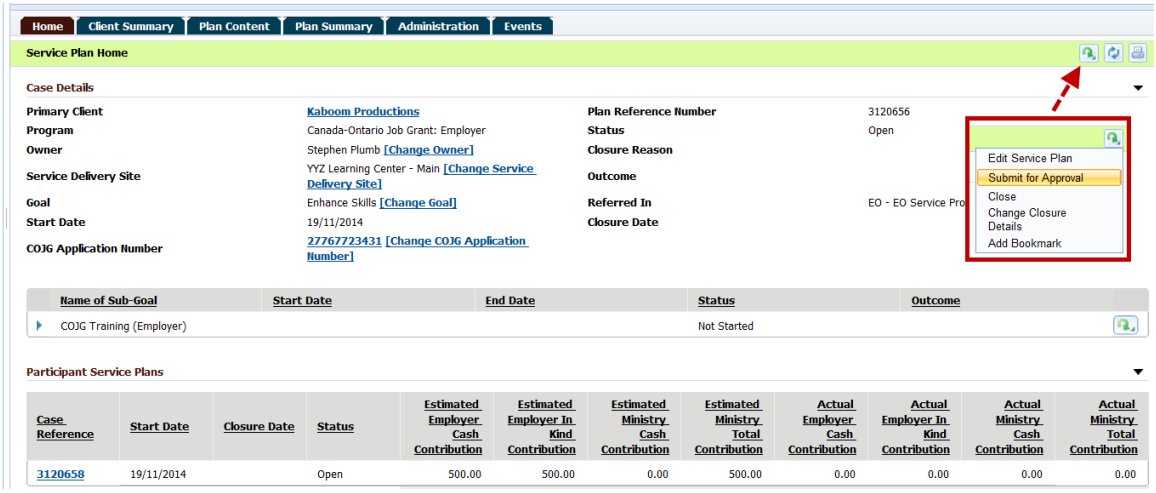
Prerequisites:

- All sections of the client summary are required before a COJG employer service plan can move to “Approved” status. If the system does not find a client summary, an error will occur.
- At least one COJG participant service plan must be linked to the COJG employer service plan.
- At least sub-goal and plan item must exist in the COJG employer service plan.

System Steps

➲ **Step 1:** *Service Plan Home*

Review the service plan, and select Submit for Approval from the **Action Button**.



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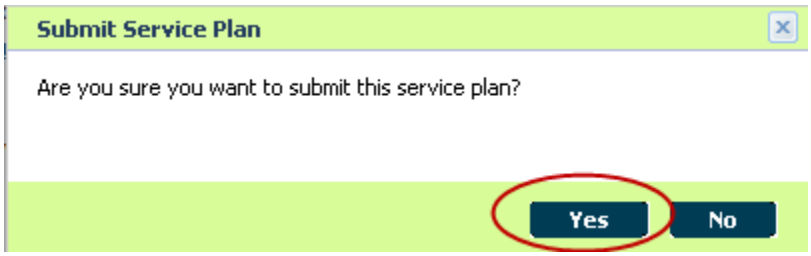
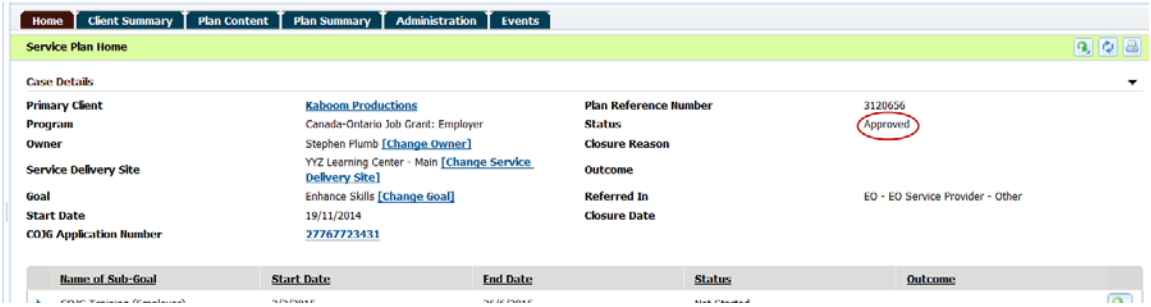
➲ **Step 2:** *Submit Service Plan*

When prompted to confirm the submission, click Yes.



➲ **Step 3** *Service Plan Home*

The **Status** of the service plan will appear as “Approved.”



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8.11 Approval and Activation of COJG Participant Service Plan

8.11.1 Submit for Approval for COJG Participant

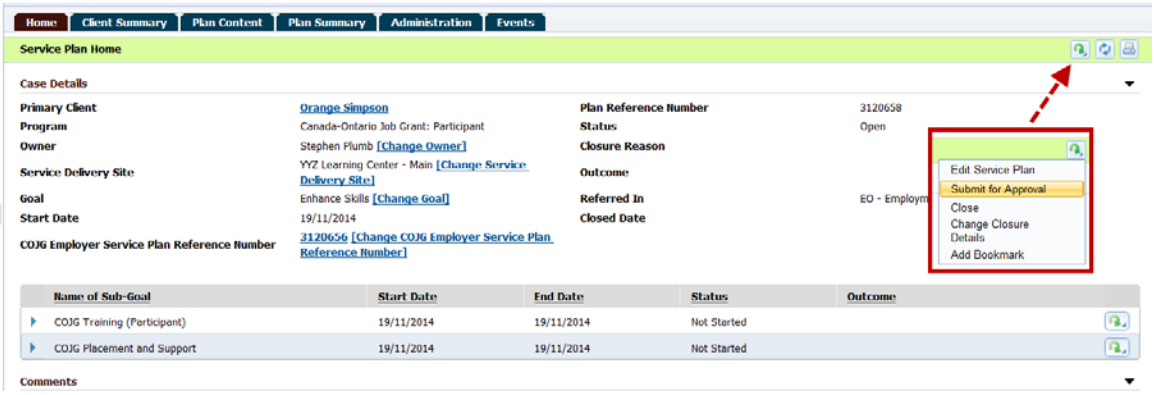
Prerequisites:

- The linked COJG employer service plan must have a **Status** of "Approved."
- The client summary is required before a service plan can move to "Approved" status. If the system does not find a client summary, an error will occur.
- A Social Insurance Number must be entered in the participant's client profile.

System Steps

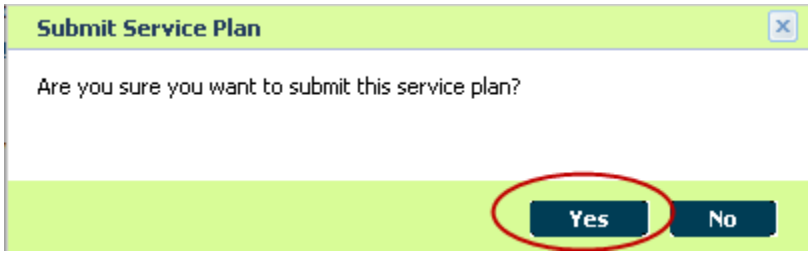
➲ **Step 1:** *Service Plan Home*

Review the service plan, and select Submit for Approval from the **Action Button**.



➲ **Step 2:** *Submit Service Plan*

When prompted to confirm the submission, click Yes.



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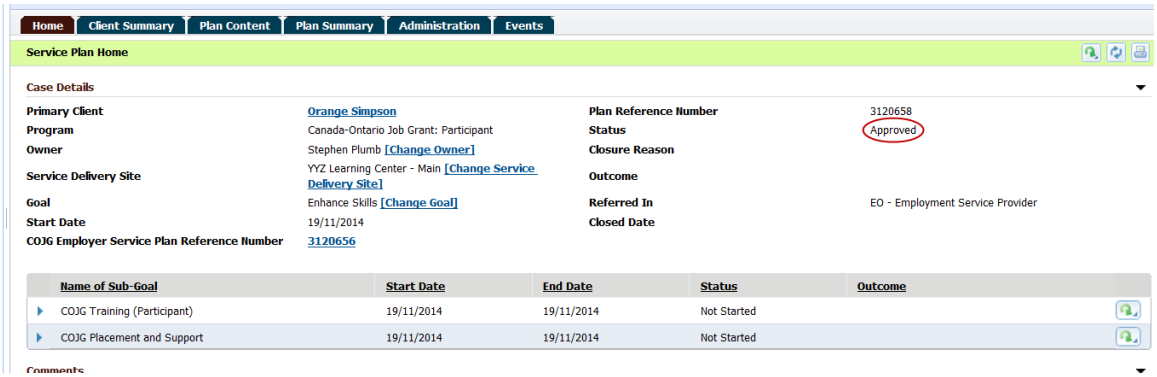
➲ **Step 3** *Service Plan Home*

The **Status** of the service plan will appear as "Approved."

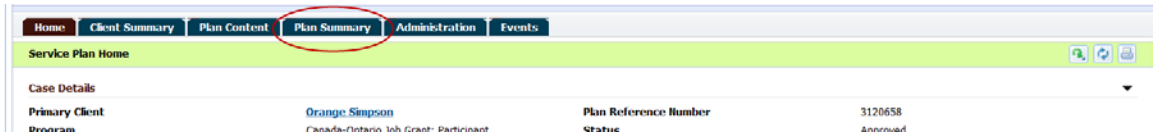


	Where the COJG employer service plan is only approved once, each linked COJG participant service plan requires system approval.

8.11.2 Create Plan Summary for COJG Participant

➲ **Step 1:** *Service Plan Home*

Click the **Plan Summary** tab.



➲ **Step 2:** *Plan Summary*

Click New.

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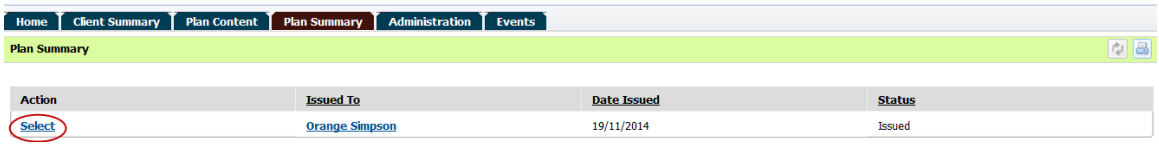
➲ Step 3: *Plan Summary*

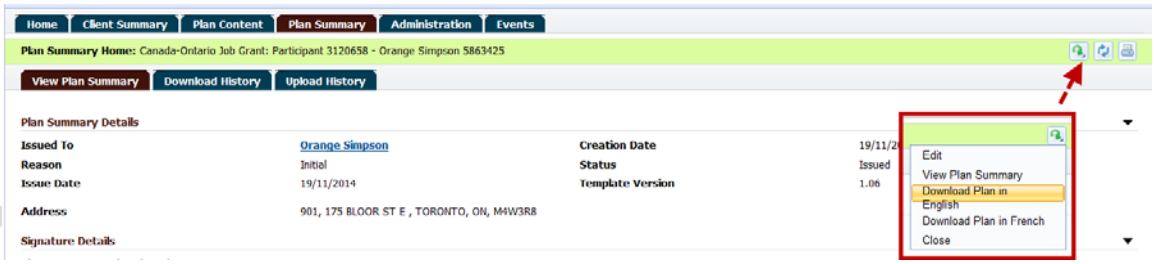
The plan summary has been created. The system populated the summary using the client and the client's address. As well, the **Issued Date** is set to the current date and the **Reason** is set to "Initial."

Click Select.



➲ Step 4: *Plan Summary Home*

Confirm information is correct. To print the plan summary, select Download Plan in English or Download Plan in French (depending on the language the client prefers) from the **Action Button**.



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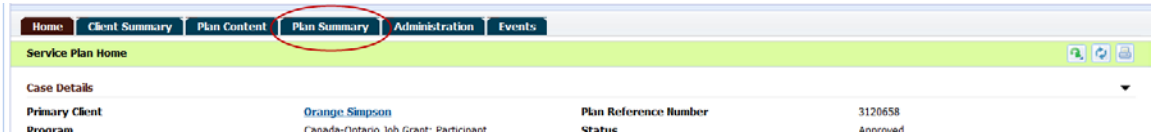
8.11.3 Record Plan Summary Acceptance for COJG Participant

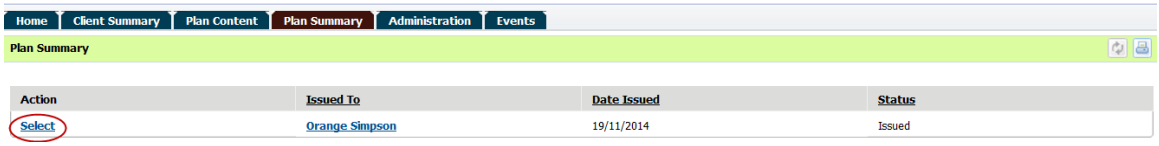
➲ **Step 1:** *Service Plan Home*

Click the **Plan Summary** tab.



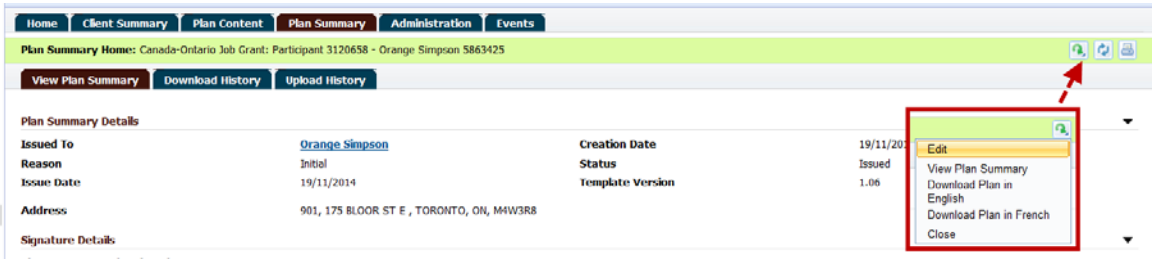
➲ **Step 2:** *Plan Summary*

Click Select next to the plan summary that requires a date signed.



➲ **Step 3:** *Plan Summary Home*

From the **Action Button**, select Edit.



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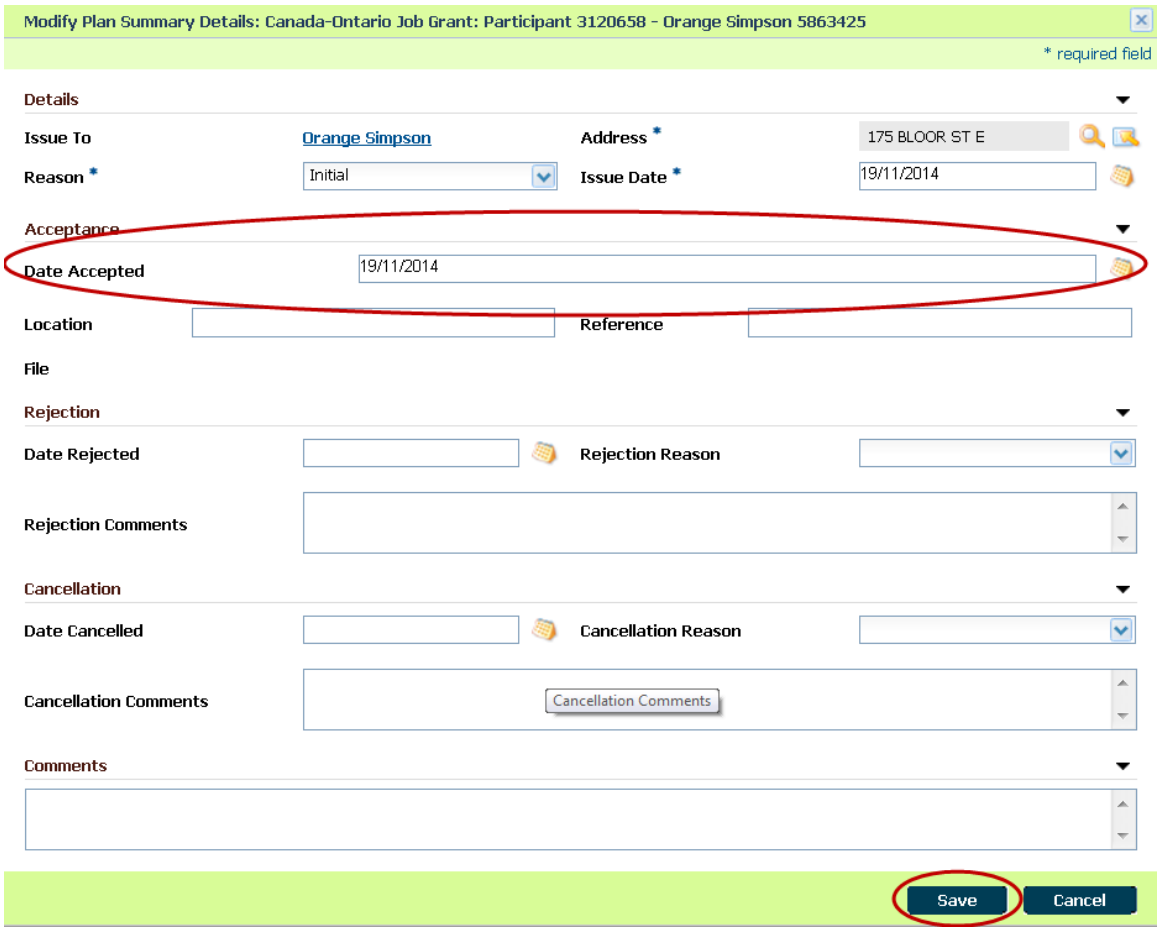
➲ Step 4: *Modify Plan Summary Details*

To record contract acceptance, enter the **Date Accepted** in the **Acceptance** information panel.

To record contract rejection, enter the **Date Rejected** in the **Rejection** information panel, and select the reason from the **Rejection Reason** drop-down menu.

To record contract cancelled, enter the **Date Cancelled** in the **Cancellation** information panel, and select the reason from the **Cancellation Reason** drop-down menu.

Once all appropriate fields are complete, click Save.



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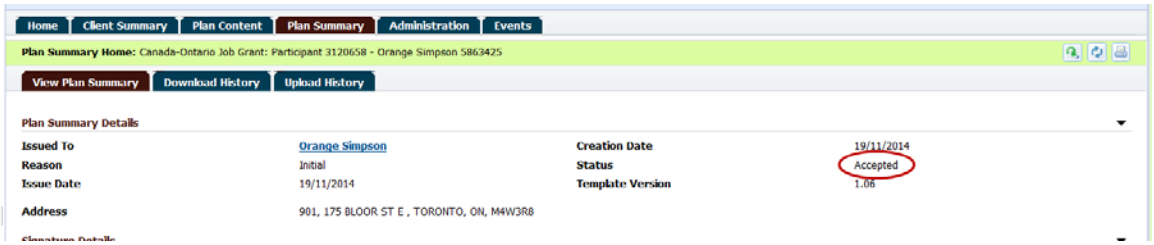
➲ **Step 5:** *Plan Summary Home*

The status has changed to “Accepted.” The COJG participant service plan **Status** is now “Active.”

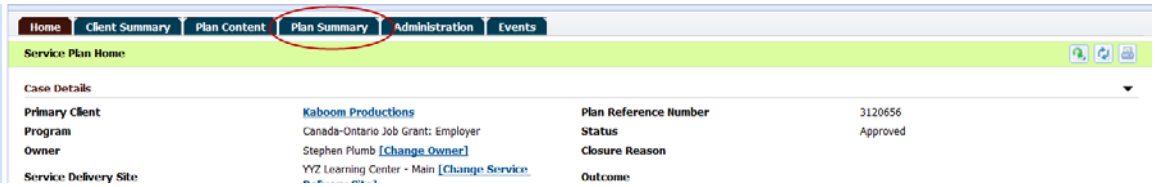


8.12 Activation of COJG Employer Service Plan

8.12.1 Create Plan Summary for COJG Employer

➲ **Step 1:** *Service Plan Home*

Click the **Plan Summary** tab.



➲ **Step 2:** *Plan Summary*

Click New.

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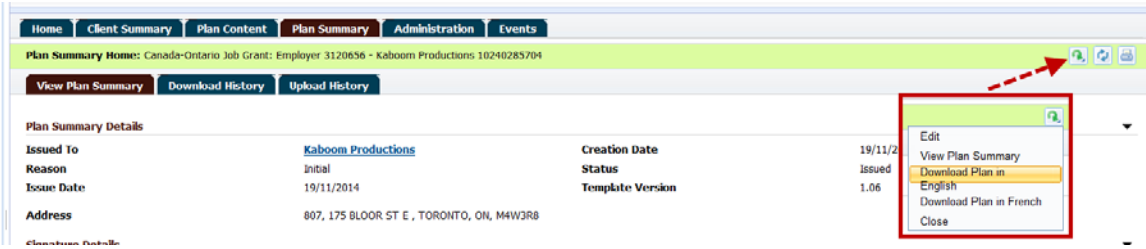
➲ **Step 3:** *Plan Summary*

The plan summary has been created. The system populated the summary using the client and the client's address. As well, the **Issued Date** is set to the current date and the **Reason** is set to "Initial."

Click Select.

➲ **Step 4:** *Plan Summary Home*

Confirm information is correct. To print the plan summary, select Download Plan in English or Download Plan in French (depending on the language the client prefers) from the **Action Button**.



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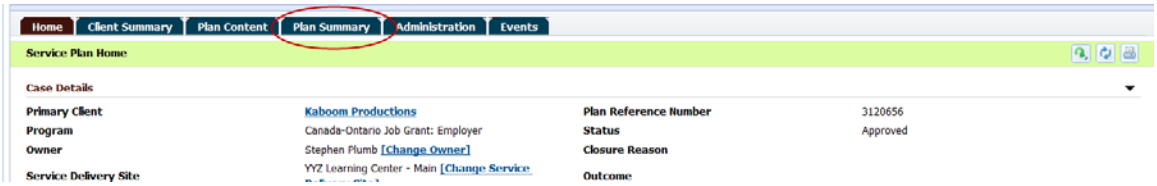
8.12.2 Record Plan Summary Acceptance for COJG Employer

➲ **Step 1:** *Service Plan Home*

Click the **Plan Summary** tab.

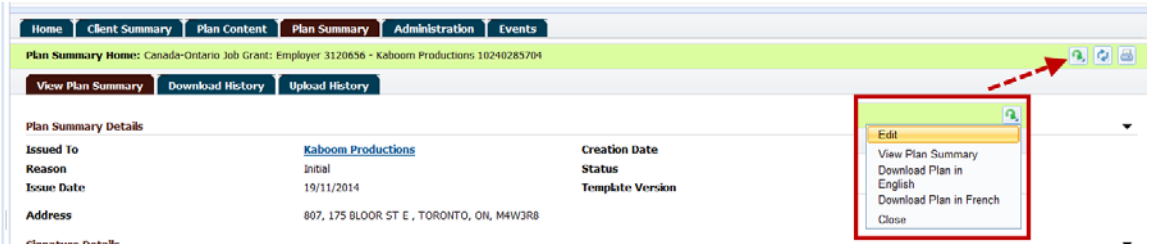


➲ **Step 2:** *Plan Summary*

Click Select next to the plan summary that requires a date signed.

➲ **Step 3:** *Plan Summary Home*

From the **Action Button**, select Edit.



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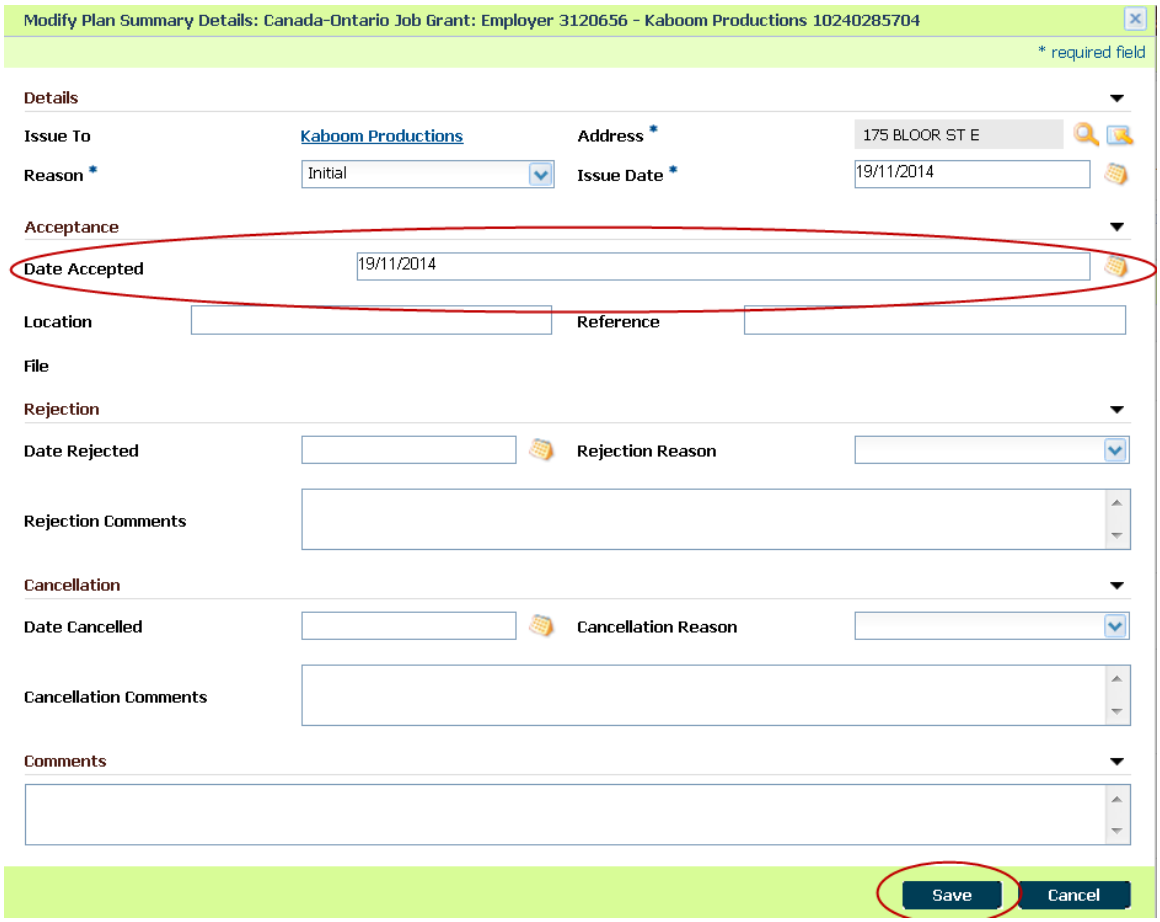
➲ Step 4: *Modify Plan Summary Details*

To record contract acceptance, enter the **Date Accepted** in the **Acceptance** information panel.

To record contract rejection, enter the **Date Rejected** in the **Rejection** information panel, and select the reason from the **Rejection Reason** drop-down menu.

To record contract cancelled, enter the **Date Cancelled** in the **Cancellation** information panel, and select the reason from the **Cancellation Reason** drop-down menu.

Once all appropriate fields are complete, click Save.



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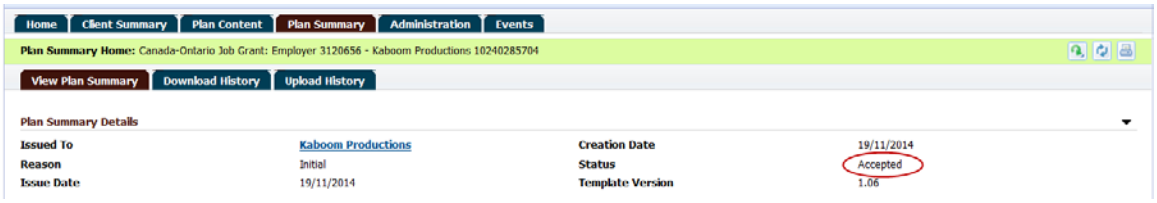
➲ **Step 5:** *Plan Summary Home*

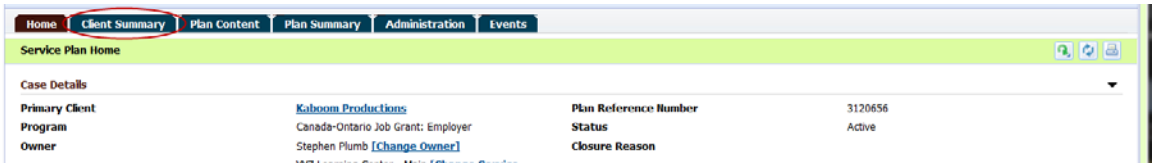
The status has changed to “Accepted.” The COJG employer service plan **Status** is now “Active.”



8.13 Modify Client Summary for COJG Employer

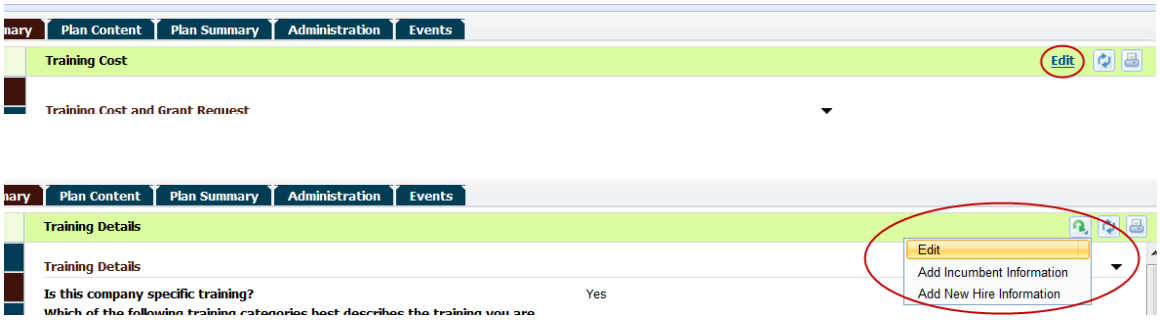
➲ **Step 1:** *Service Plan Home*

Click the **Client Summary** tab.



➲ **Step 2:** *Client Summary*

Click Edit, which in some instances is found in the **Action Button**).



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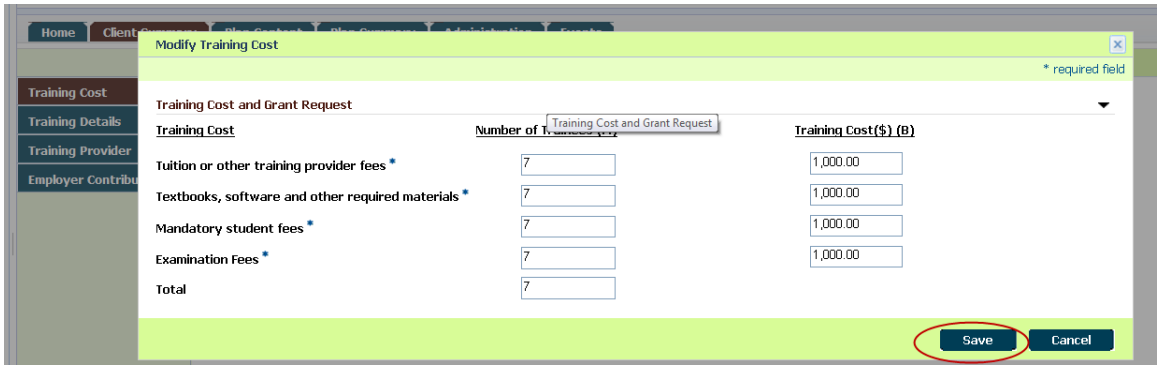
➲ **Step 3:** *Create Client Summary*

Complete all fields, and click Save.

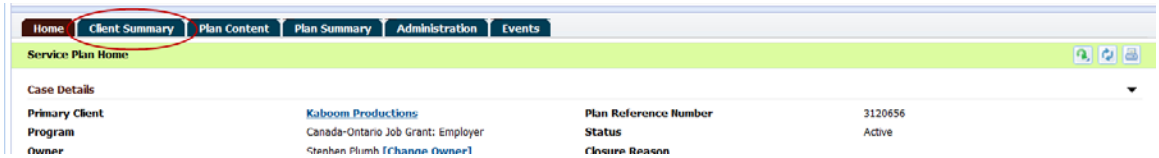


8.13.1 Adding Incumbent and New Hire Information for COJG Employer

Under the *Training Details* section, additional incumbent and new hire information can be added.

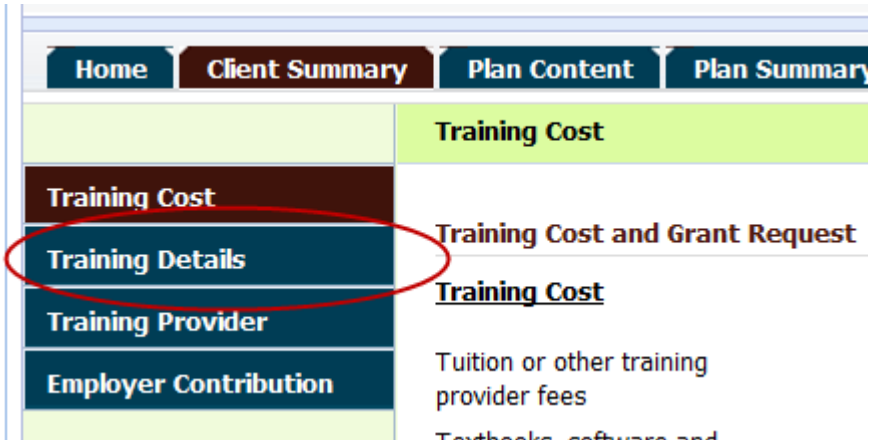
➲ **Step 1:** *Service Plan Home*

Click the **Client Summary** tab.



➲ **Step 2:** *Client Summary*

In the Tab Content Bar, select **Training Details.**



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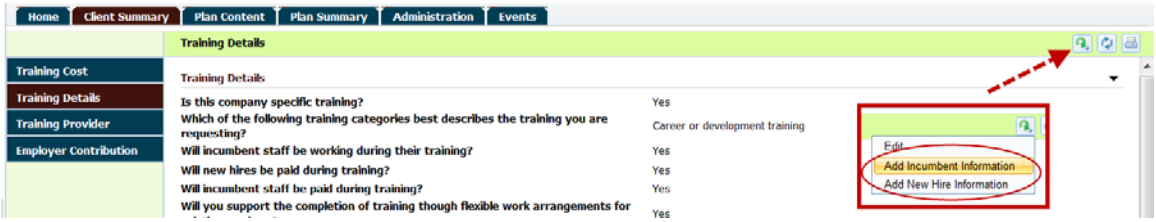
➲ Step 3: *Training Details*

From the **Action Button**, click Add Incumbent Information or Add New Hire Information.



➲ Step 4: *Create Incumbent/New Hire Information*

Complete the required fields and click Save.

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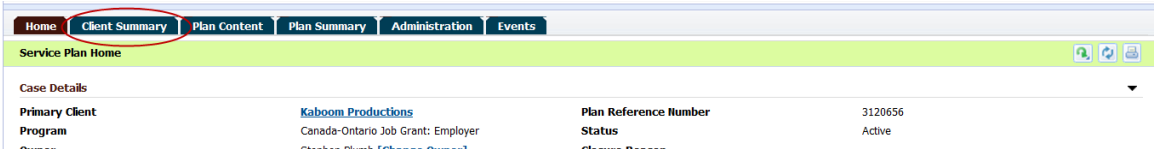
8.13.2 Adding a Training Schedule for COJG Employer

Under the *Training Provider* section, additional training schedules can be added.

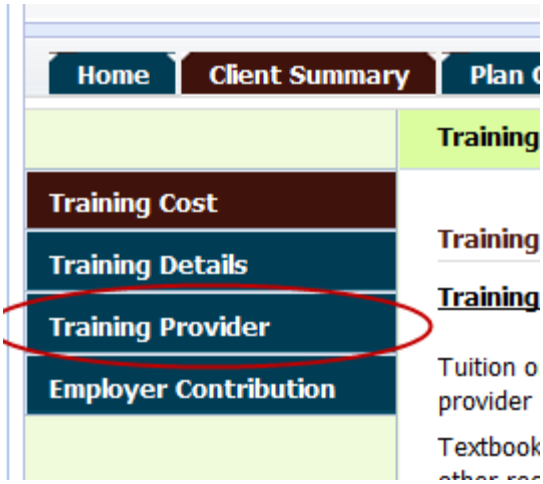
➲ **Step 1:** *Service Plan Home*

Click the **Client Summary** tab.



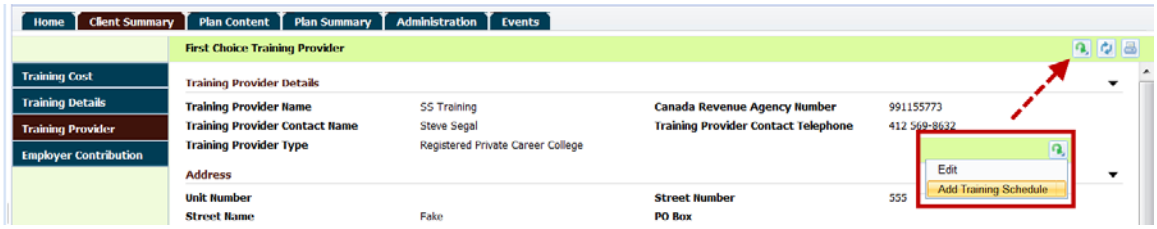
➲ **Step 2:** *Client Summary*

In the Tab Content Bar, select **Training Provider.**



➲ **Step 3:** *Training Details*

From the **Action Button**, click Add Training Schedule.



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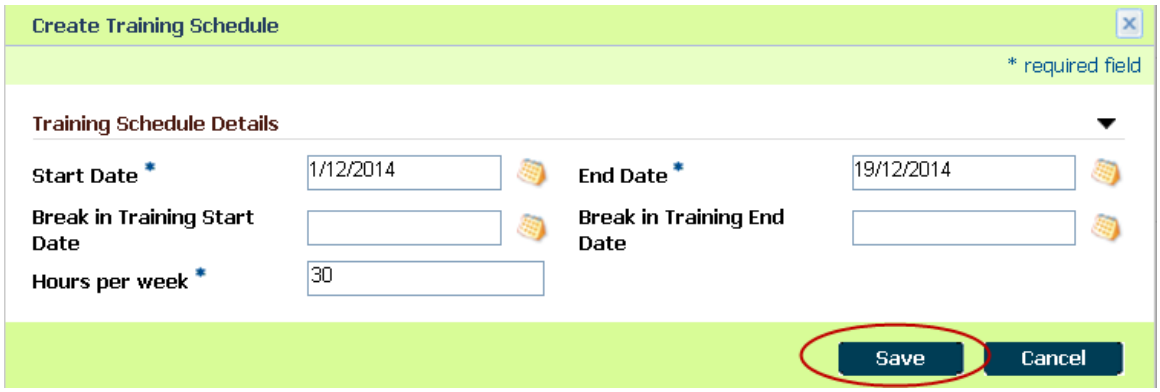
➲ **Step 4:** *Create Training Schedule*

Complete the required fields and click Save.

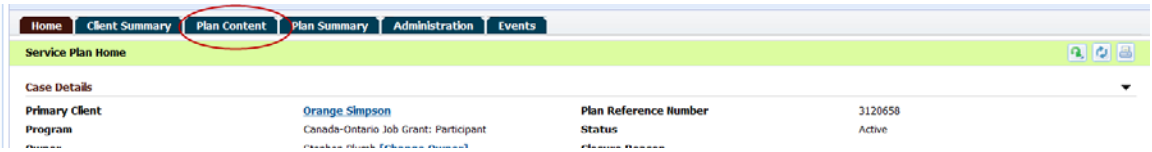


8.14 Service Plan Content Modification (for both COJG Participant and Employer Service Plans)

8.14.1 Modify (Complete) Plan Items

➲ **Step 1:** *Service Plan Home*

Click the **Plan Content** tab.



➲ **Step 2:** *Plan Content*

Toggle the relevant sub-goal.

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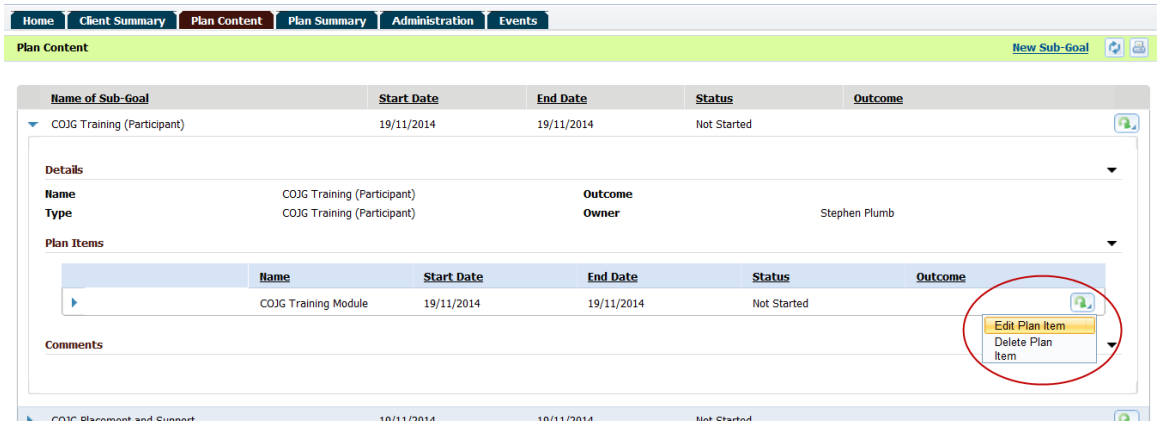
➲ Step 3: *Plan Content*

Click Edit Plan Item from the **Action Button** next to the relevant plan item.



➲ Step 4: *Modify Plan Item*

Enter the **Actual Start Date** and **Actual End Date**. Select the appropriate **Outcome** from the drop-down menu.

For the **COJG Training Module** plan item, it is extremely important that users keep the **Actual** fields for **Employer Cash Contribution**, **Employer In-Kind Contribution** and **Total Cost.** The data in these fields will be filtering into Service Provider and Ministry reports.

Click Save

	Estimated Cost cannot be modified once the plan item has been saved.

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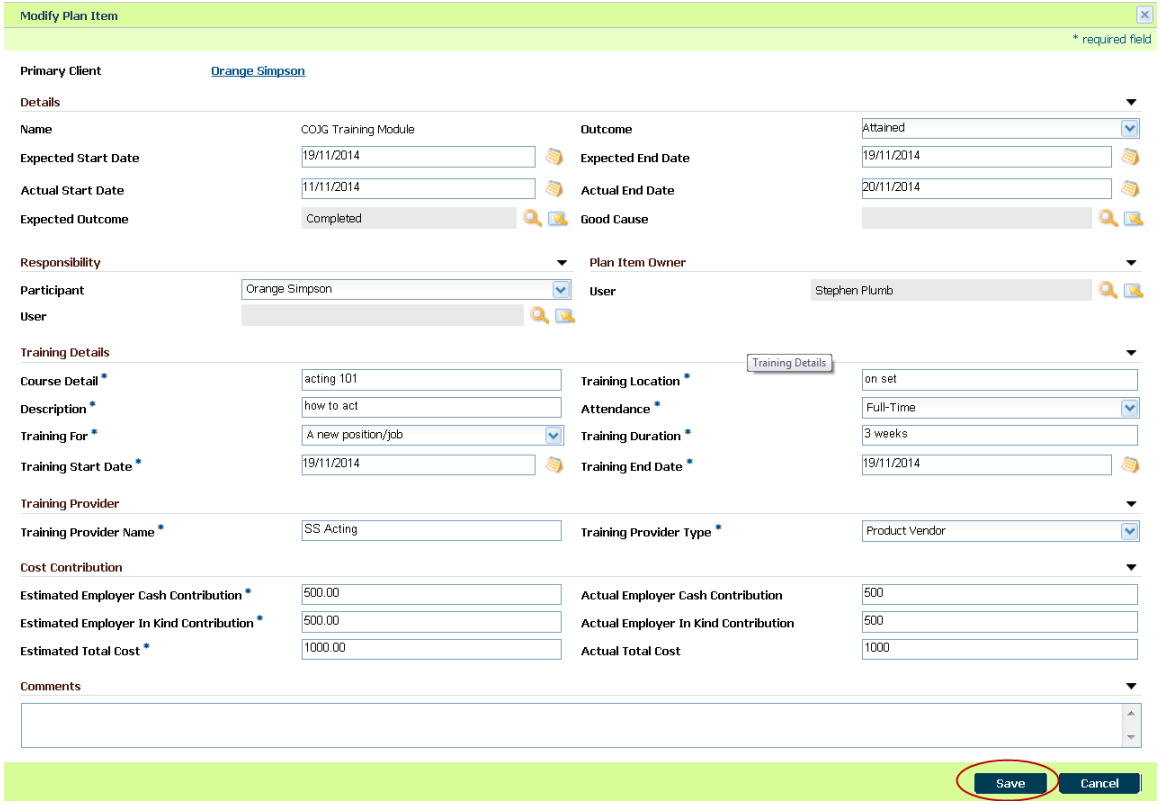

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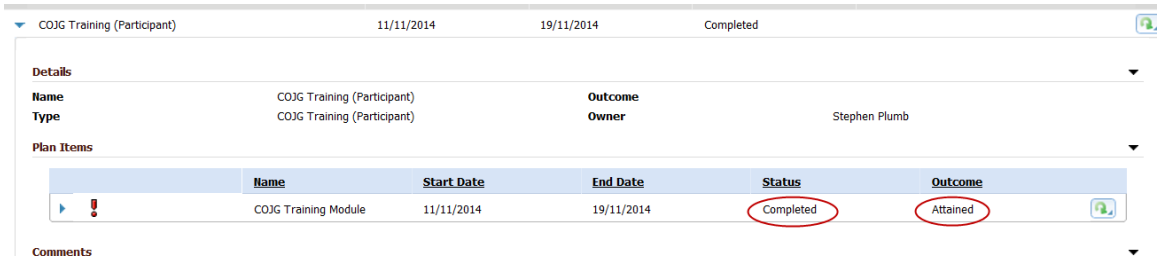
➲ **Step 5:** *Plan Content*

The **Status** has now changed to “Completed” and the **Outcome** has now changed to “Attained.”

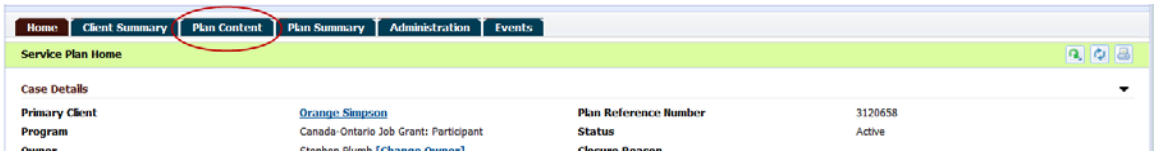


8.14.2 Delete Plan Items

	If a plan item has a status of “In Progress” or “Completed,” it cannot be deleted; it can only be cancelled. Please refer to Section 18.4.3 Cancel Plan Item to perform this function. Once a plan item has been deleted, no record remains.

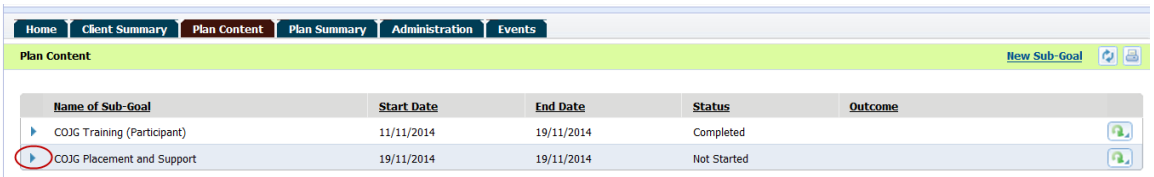
➲ **Step 1:** *Service Plan Home*

Click the **Plan Content** tab.



➲ **Step 2:** *Plan Content*

Toggle the relevant sub-goal.



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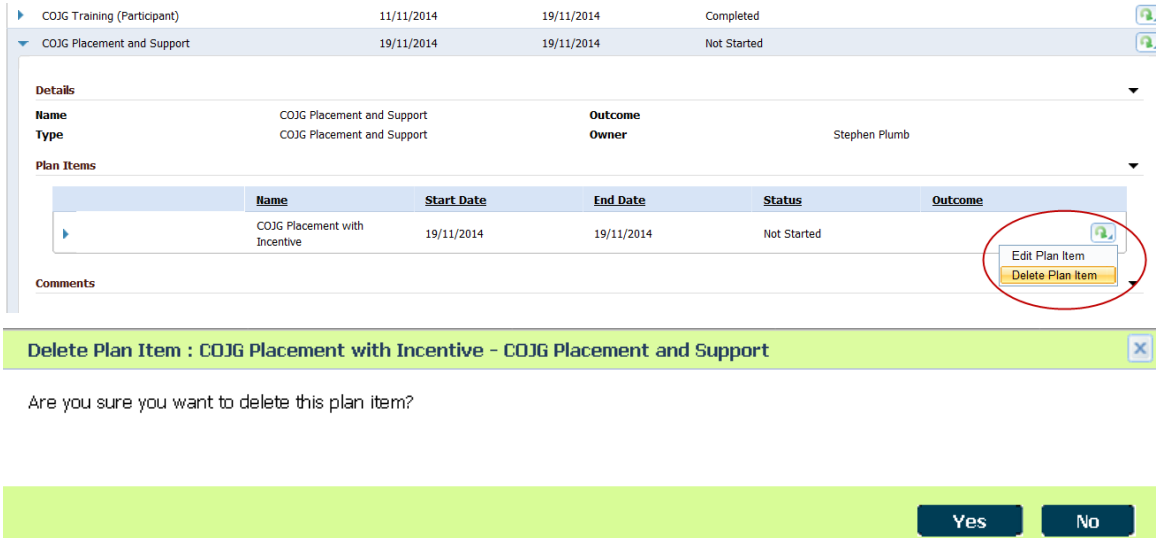
➲ **Step 3:** *Plan Content*

Click Delete from the **Action Button** next to the relevant plan item. When prompted to confirm the delete, click Yes.



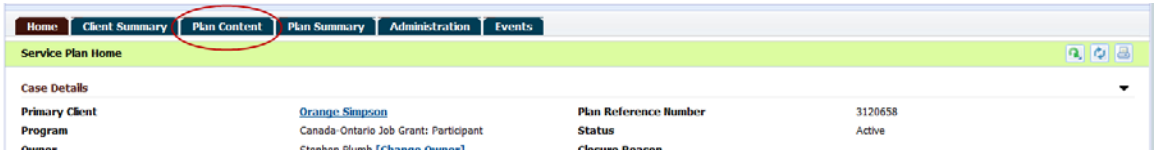
➲ **Step 4:** *Plan Content*

The deleted plan item will no longer appear with the associated sub-goal.

8.14.3 Cancel Plan Item

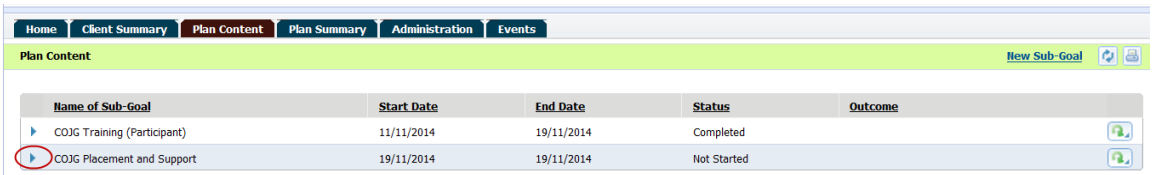
➲ **Step 1:** *Service Plan Home*

Click the **Plan Content** tab.



➲ **Step 2:** *Plan Content*

Toggle the relevant sub-goal.



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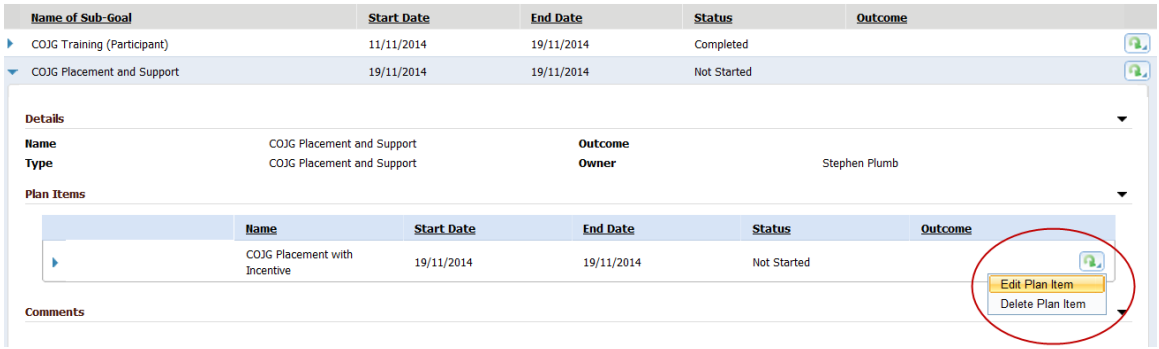
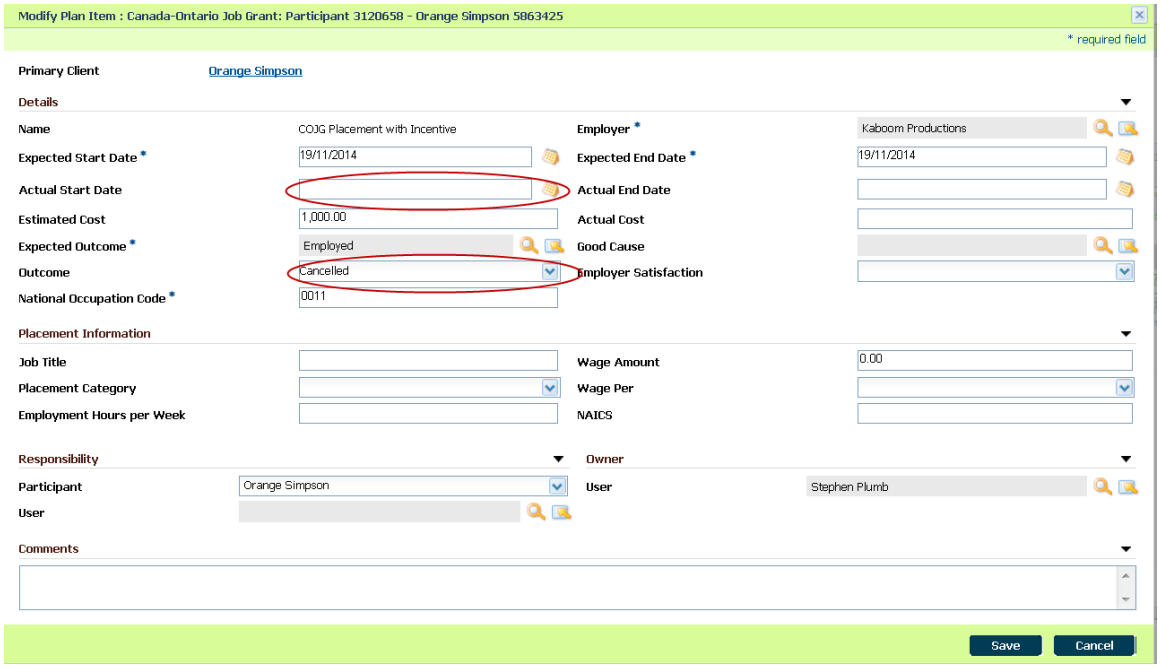
➲ Step 3: *Plan Content*

Click Edit from the **Action Button** next to the relevant plan item.



➲ Step 4: *Modify Plan Item*

Select “Cancelled” from the **Outcome** drop-down menu. If an **Actual Start Date** has been previously entered and saved, delete the date. Click Save.



➲ Step 5: *Plan Content*

The **Outcome** has changed to “Cancelled.”

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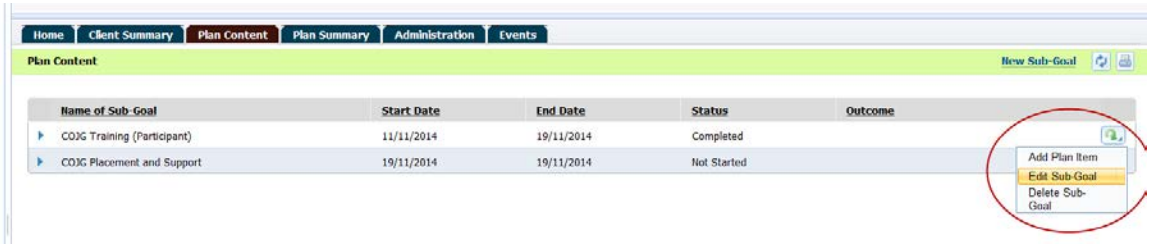
8.14.4 Cancel Sub-Goal

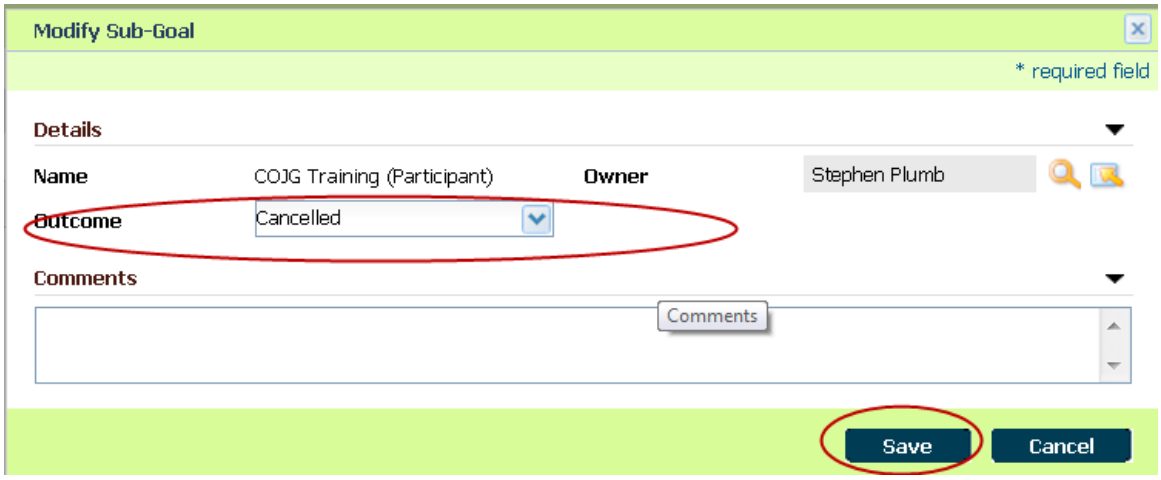
➲ **Step 1:** *Plan Content*

From the **Action Button** next to the relevant sub-goal, select Edit Sub-Goal.



➲ **Step 2:** *Modify Sub-Goal*

Select "Cancelled "from the **Outcome** drop-down menu, and click Save.



➲ **Step 3:** *Plan Content*

The **Outcome** has changed.

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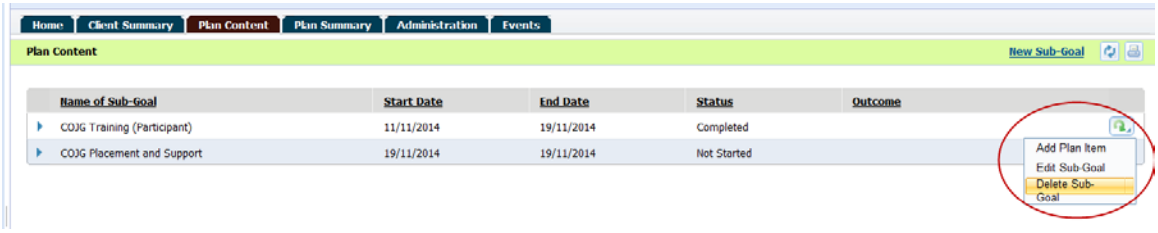
8.14.5 Delete Sub-Goal

	A sub-goal cannot be deleted if there are plan items associated with it.

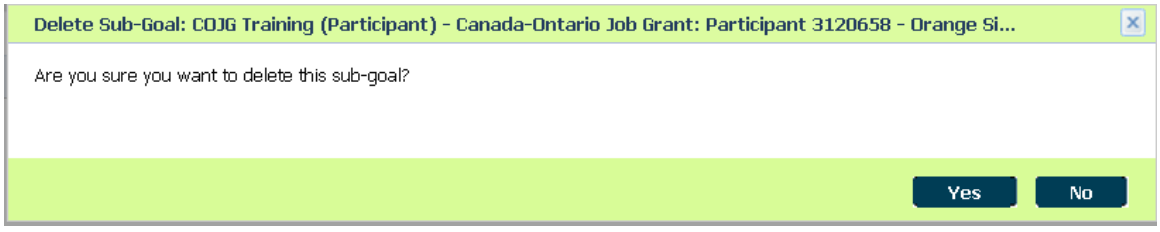
➲ **Step 1:** *Plan Content*

From the **Action Button** next to the relevant sub-goal, select Delete Sub-Goal.



➲ **Step 2:** *Delete Sub-Goal*

When asked to confirm the delete, click Yes.


Delete Sub-Goal: COJG Training (Participant) - Canada-Ontario Job Grant: Participant 3120658 - Orange Si...
Are you sure you want to delete this sub-goal?
Yes
No

➲ **Step 3:** *Plan Content*

The deleted sub-goal will no longer appear.

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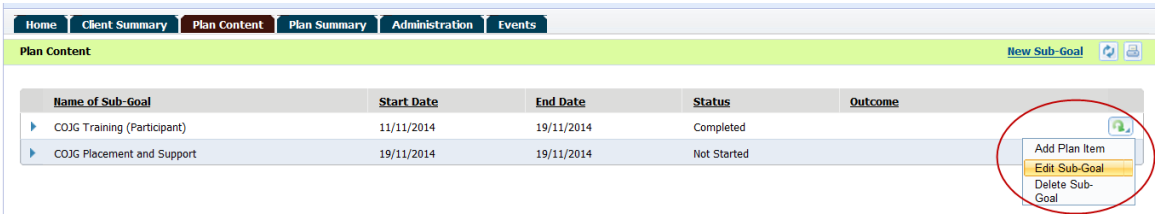
8.14.5 Complete Sub-Goals

Prerequisite:

All associated plan items must have a status of “Completed” or “Cancelled.”

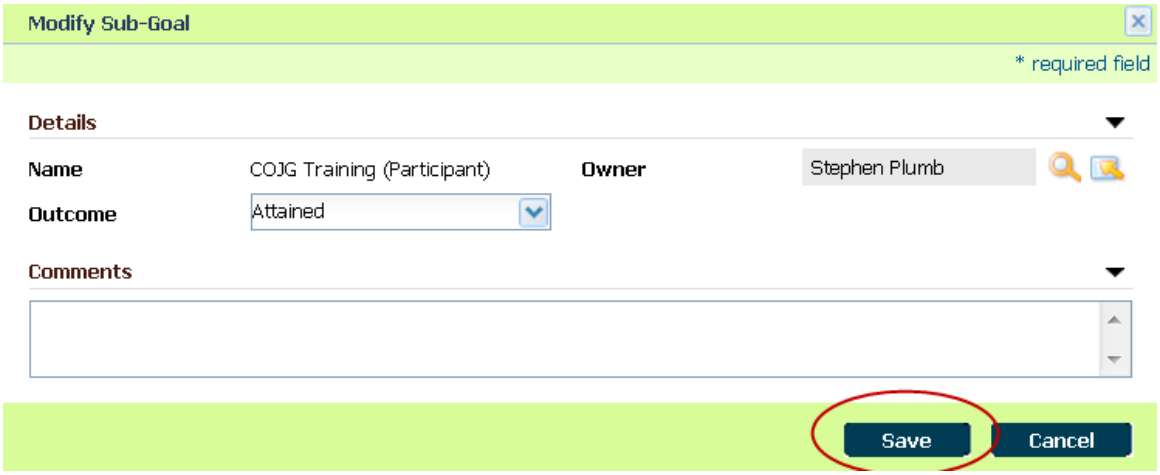
➲ **Step 1:** *Plan Content*

From the **Action Button** next to the relevant sub-goal, select Edit Sub-Goal.



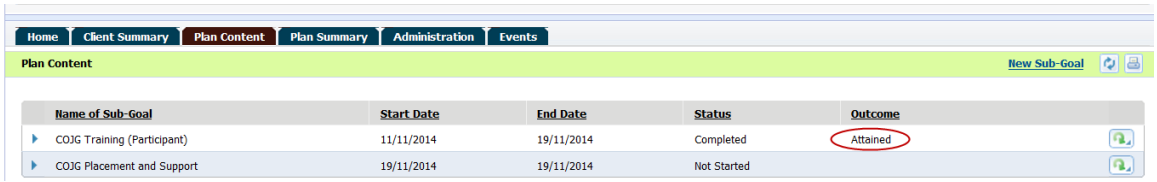
➲ **Step 2:** *Modify Sub-Goal*

Select the appropriate **Outcome** item from the drop-down menu, and click Save.



➲ **Step 3:** *Plan Content*

The **Outcome** has changed.



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8.15 Close COJG Participant Service Plan

	If you close a service plan, it cannot be reopened.

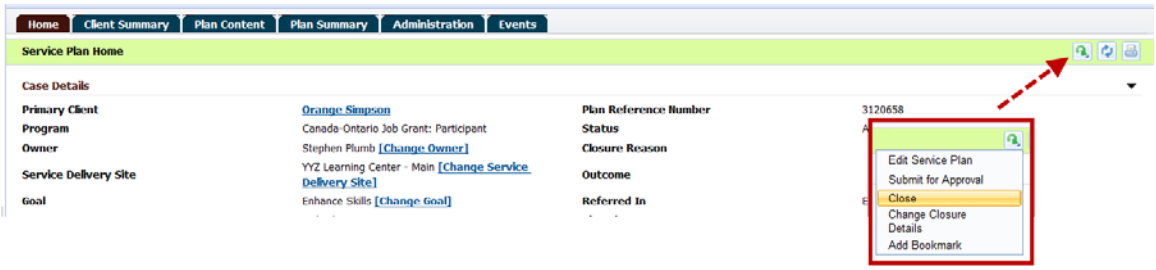
	If the **Owner** of the service plan is no longer an active user, they will be forced to change the **Owner** to an active CaMS user - for the auto-generation of reviews.

Prerequisite:

A service plan can only be closed when its **Status** is “Active” and all plan items and sub-goals have outcomes saved, or at any time as long as the **Reason** is "Opened in Error" or the plan summary status is "Cancelled” or “Rejected."

➲ **Step 1:** *Service Plan Home*

From the **Action** Button, click Close.



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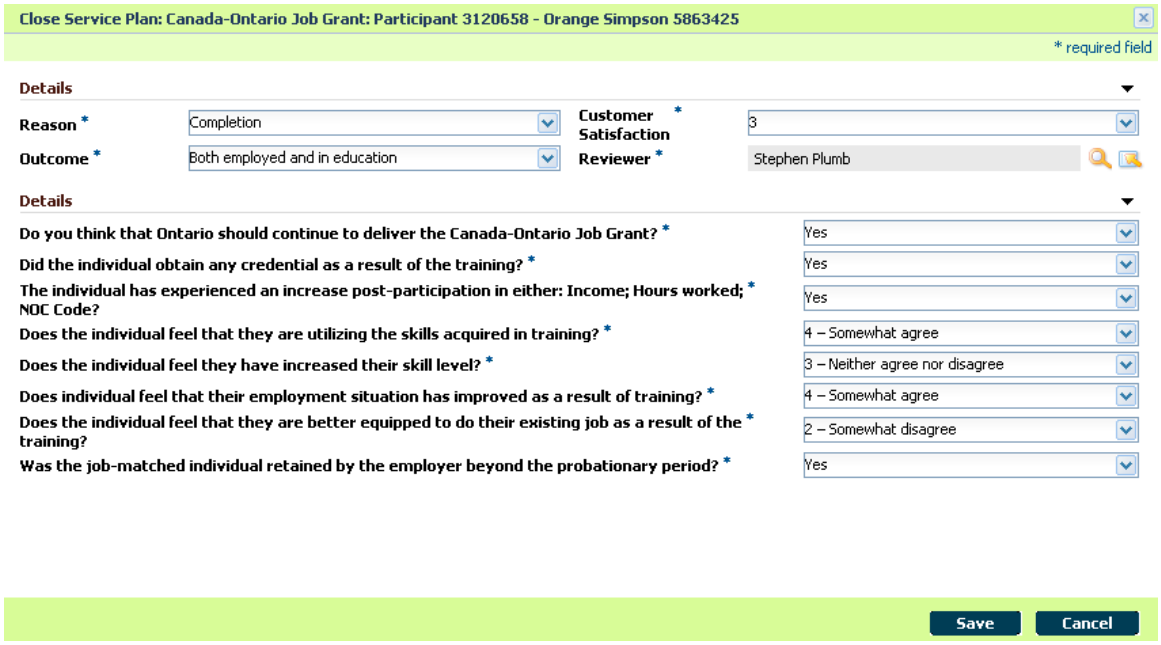
➲ **Step 2:** *Close Service Plan*

Complete all fields. The current case owner will default as the service plan **Reviewer**. To choose a different **Reviewer**, click on the magnifying glass and select the appropriate user. Click Save.

	The **Closure Reason** cannot be changed once the service plan has been closed with a reason of 'Opened in Error'.


Close Service Plan: Canada-Ontario Job Grant: Participant 3120658 - Orange Simpson 5863425
* required field
Details
Reason *
Completion
Customer Satisfaction *
3
Outcome *
Both employed and in education
Reviewer *
Stephen Plumb
Details
Do you think that Ontario should continue to deliver the Canada-Ontario Job Grant? *
Yes
Did the individual obtain any credential as a result of the training? *
Yes
The individual has experienced an increase post-participation in either: Income; Hours worked; NOC Code? *
Yes
Does the individual feel that they are utilizing the skills acquired in training? *
4 – Somewhat agree
Does the individual feel they have increased their skill level? *
3 – Neither agree nor disagree
Does individual feel that their employment situation has improved as a result of training? *
4 – Somewhat agree
Does the individual feel that they are better equipped to do their existing job as a result of the training? *
2 – Somewhat disagree
Was the job-matched individual retained by the employer beyond the probationary period? *
Yes
Save
Cancel

	If **Comments** need to be added related to the closure reason, this can be inputted into the *Change Closure Details* page, which can be found in the **Action Button** on the *Service Plan Home* page.

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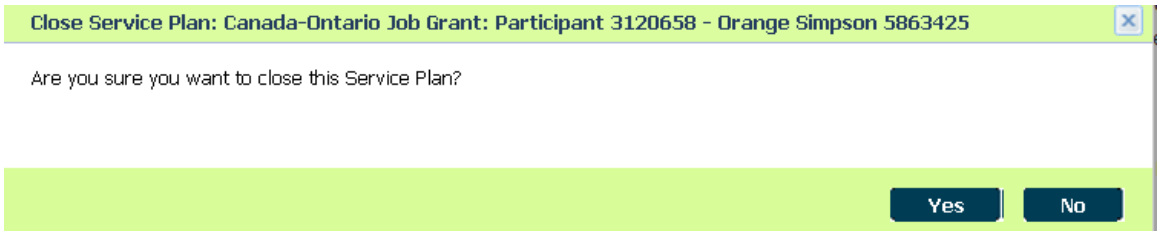
➲ **Step 3:** *Close Service Plan*

Click Yes to close the service plan.


Close Service Plan: Canada-Ontario Job Grant: Participant 3120658 - Orange Simpson 5863425
Are you sure you want to close this Service Plan?
Yes
No

8.16 Close COJG Employer Service Plan

	If you close a service plan, it cannot be reopened.

	If the **Owner** of the service plan is no longer an active user, they will be forced to change the **Owner** to an active CaMS user - for the auto-generation of reviews.

Prerequisite:

All linked COJG participant service plans must be closed prior to closing the COJG employer service plan.

A service plan can only be closed when its **Status** is “Active” and all plan items and sub-goals have outcomes saved, or at any time as long as the **Reason** is "Opened in Error" or the plan summary status is "Cancelled” or “Rejected."

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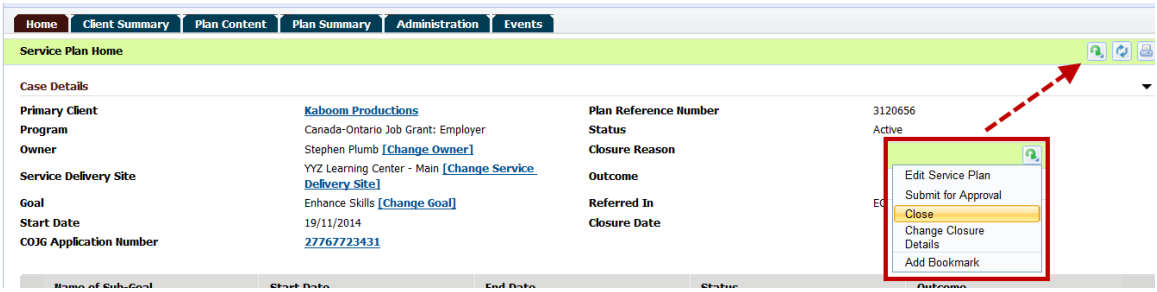
➲ **Step 1:** *Service Plan Home*

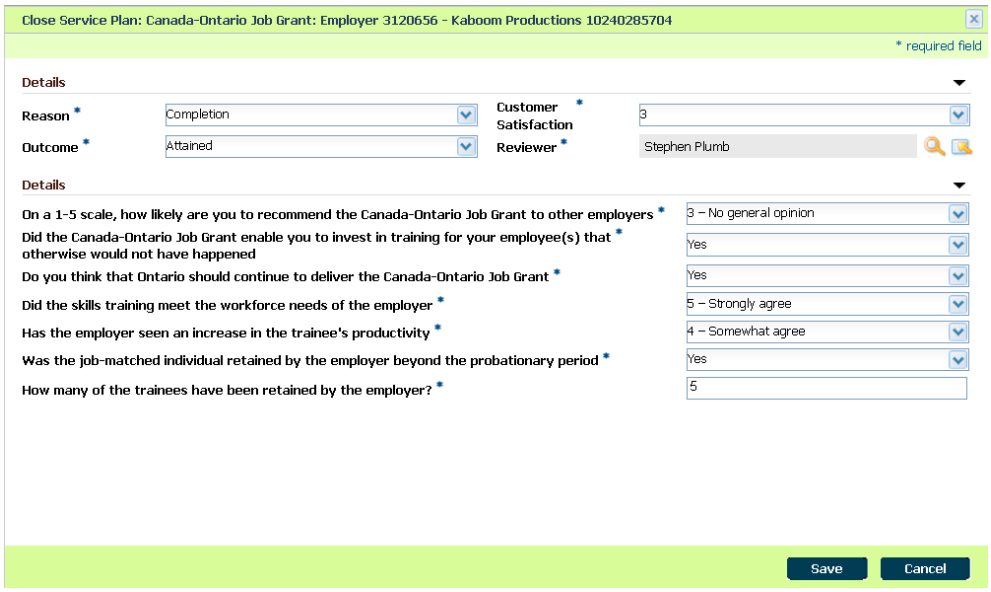
From the **Action** Button, click Close.



➲ **Step 2:** *Close Service Plan*

Complete all fields. The current case owner will default as the service plan **Reviewer**. To choose a different **Reviewer**, click on the magnifying glass and select the appropriate user. Click Save.

	The **Closure Reason** cannot be changed once the service plan has been closed with a reason of 'Opened in Error'.


Close Service Plan: Canada-Ontario Job Grant: Employer 3120656 - Kaboom Productions 10240285704
* required field
Details
Reason *
Completion
Customer Satisfaction *
3
Outcome *
Attained
Reviewer *
Stephen Plumb
Details
On a 1-5 scale, how likely are you to recommend the Canada-Ontario Job Grant to other employers *
3 – No general opinion
Did the Canada-Ontario Job Grant enable you to invest in training for your employee(s) that otherwise would not have happened *
Yes
Do you think that Ontario should continue to deliver the Canada-Ontario Job Grant *
Yes
Did the skills training meet the workforce needs of the employer *
5 – Strongly agree
Has the employer seen an increase in the trainee's productivity *
4 – Somewhat agree
Was the job-matched individual retained by the employer beyond the probationary period *
Yes
How many of the trainees have been retained by the employer? *
5
Save
Cancel

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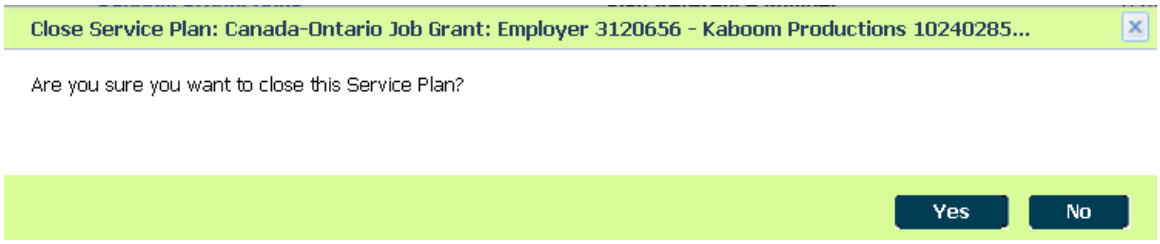
	If **Comments** need to be added related to the closure reason, this can be inputted into the *Change Closure Details* page, which can be found in the **Action Button** on the *Service Plan Home* page.

➲ **Step 3:** *Close Service Plan*

Click Yes to close the service plan.


Close Service Plan: Canada-Ontario Job Grant: Employer 3120656 - Kaboom Productions 10240285...
Are you sure you want to close this Service Plan?
Yes
No

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8.17 Reviews

Reviews must be completed for the COJG employer service plan as well as all associated COJG participant service plans. Upon closure, unless the **Closure Reason** is "Opened in Error," reviews are automatically generated by the system.

8.17.1 Review Generation

Prerequisite:

The service plan must be closed.

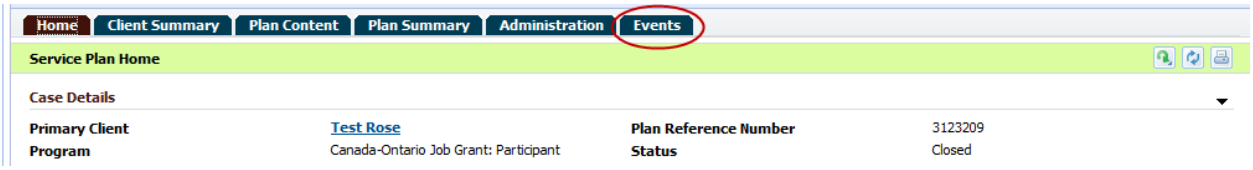
	Note that pending reviews can also be found using the Pending Reviews link from the **My Shortcuts** list on the *Workspace*.

➲ **Step 1:** *Service Plan Home*

When a service plan is closed, the system will automatically generate the 3-month follow-up review for COJG employer service plans and the 6-month review for COJG participant service plans. Once this review is completed, the system will then auto-generate reviews in a cascading fashion.

	Note that the review schedule is different for COJG employers and participants. In addition to the follow-up information collected upon closure, COJG employer service plans require reviews at **3 Months** and **12 Months**. COJG participant service plans require reviews at **6 Months** and **12 Months**.

Click the **Events** tab.



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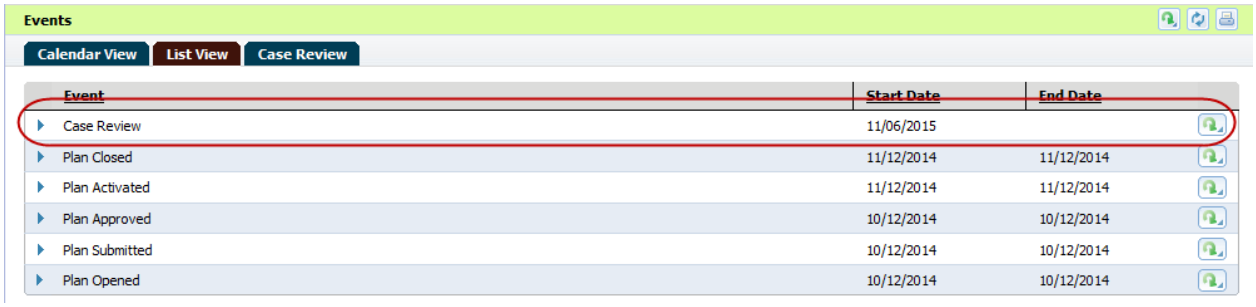
➲ **Step 2:** *List View*

The review related to the service plan will appear in the Events List.



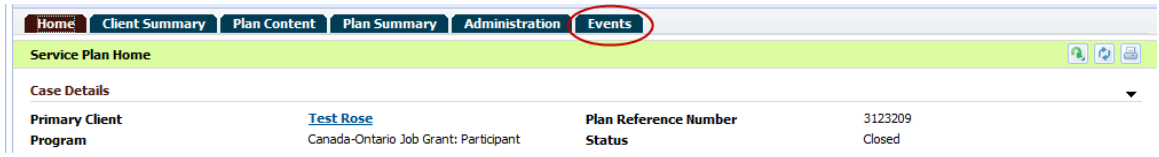
8.17.2 Create Review (Manually)

Prerequisite:

The service plan must be closed.

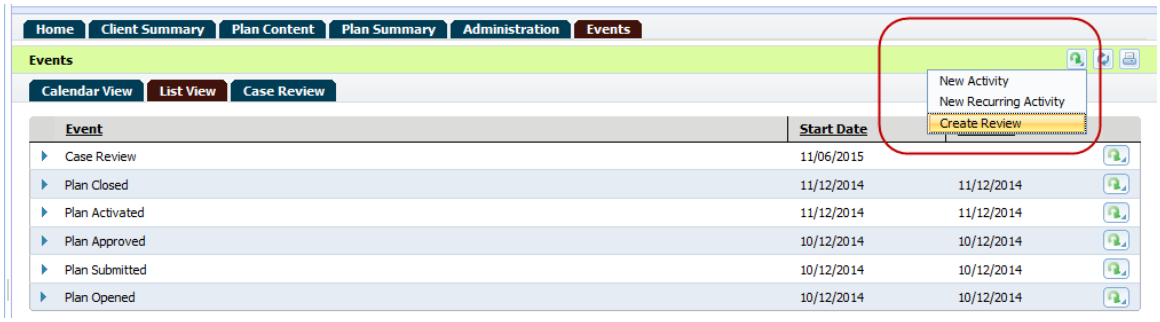
➲ **Step 1:** *Service Plan Home*

Click the **Events** tab.



➲ **Step 2:** *Events*

From the **Action** Button, select Create Review.



➲ **Step 3:** *New Review*

Use the magnifying glass icon to select the **Reviewer**, select a **Reason** from the drop-down menu, and enter a **Scheduled Start Date** at the desired time from the service plan closure date (3 or 12 months for COJG employers; 6 or 12

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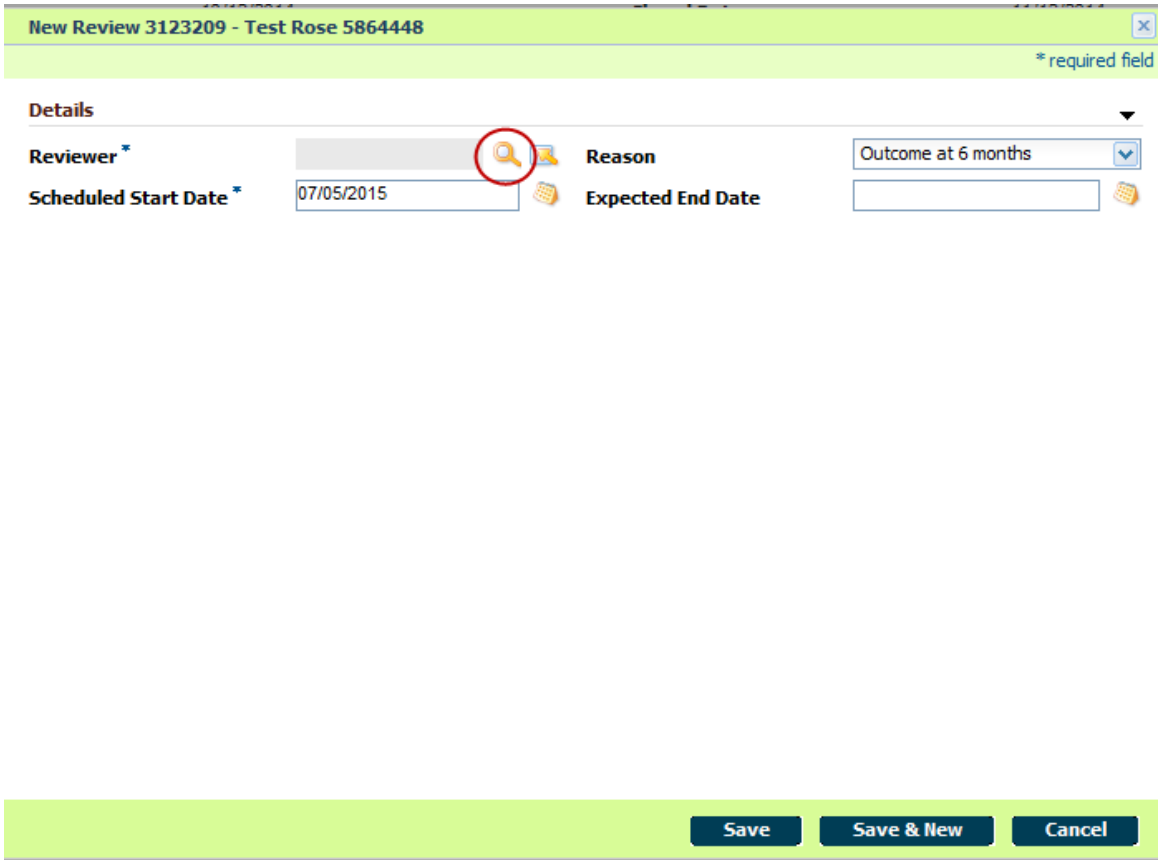
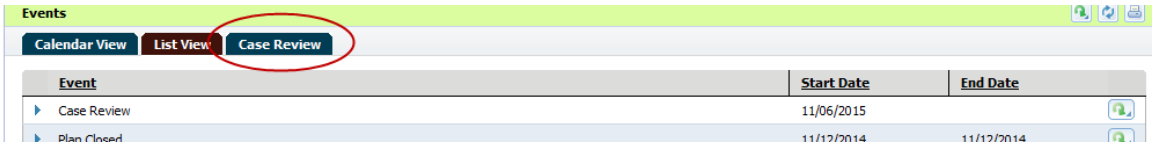
months for COJG participants). The **Expected End Date** must be the same as the **Scheduled Start Date**. Click Save or Save & New.



➲ **Step 4:** *Events* Click the **Case Review** tab.



➲ **Step 5:** *Case Review*

The **Case Review** list will display all reviews for the service plan. Click the toggle to view the details of the relevant case review.

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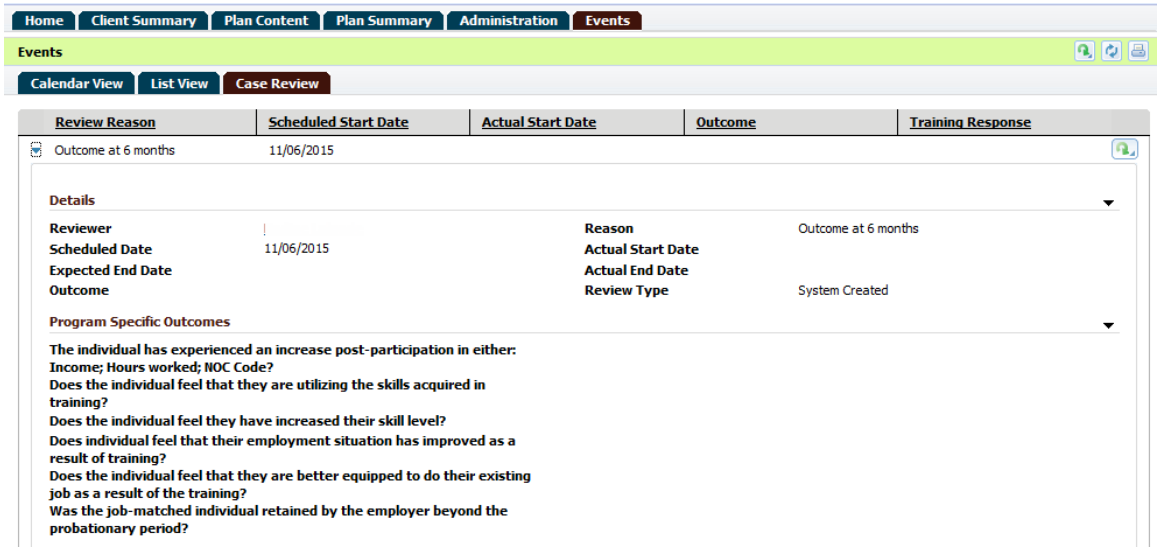
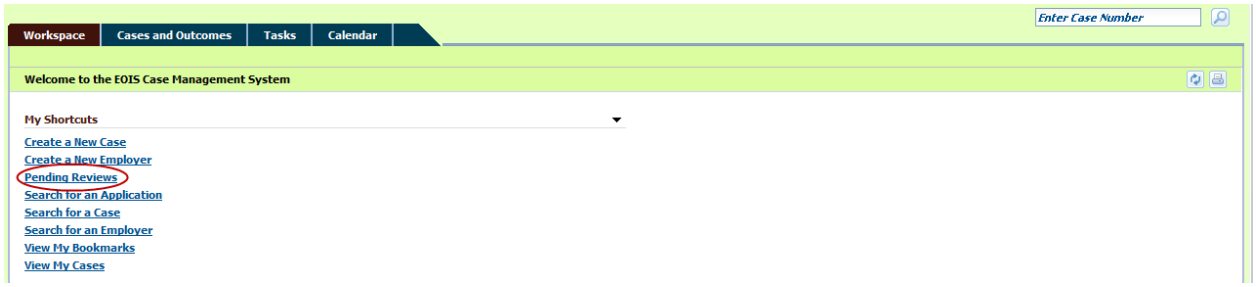


8.17.3 Modify or Complete Review

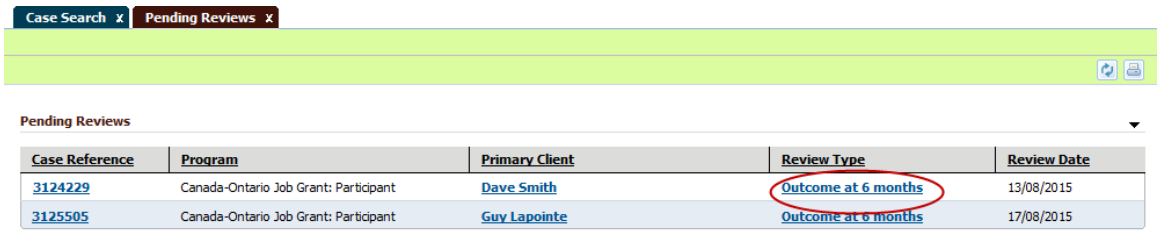
➲ **Step 1:** *Workspace*

Click Pending Reviews from the **My Shortcuts** list.



➲ **Step 2:** *Pending Reviews*

Click on the Review Type for the appropriate review .



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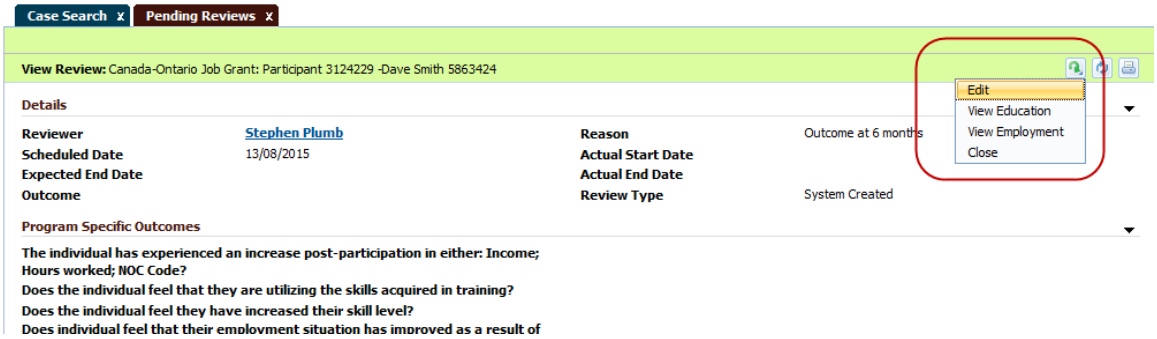
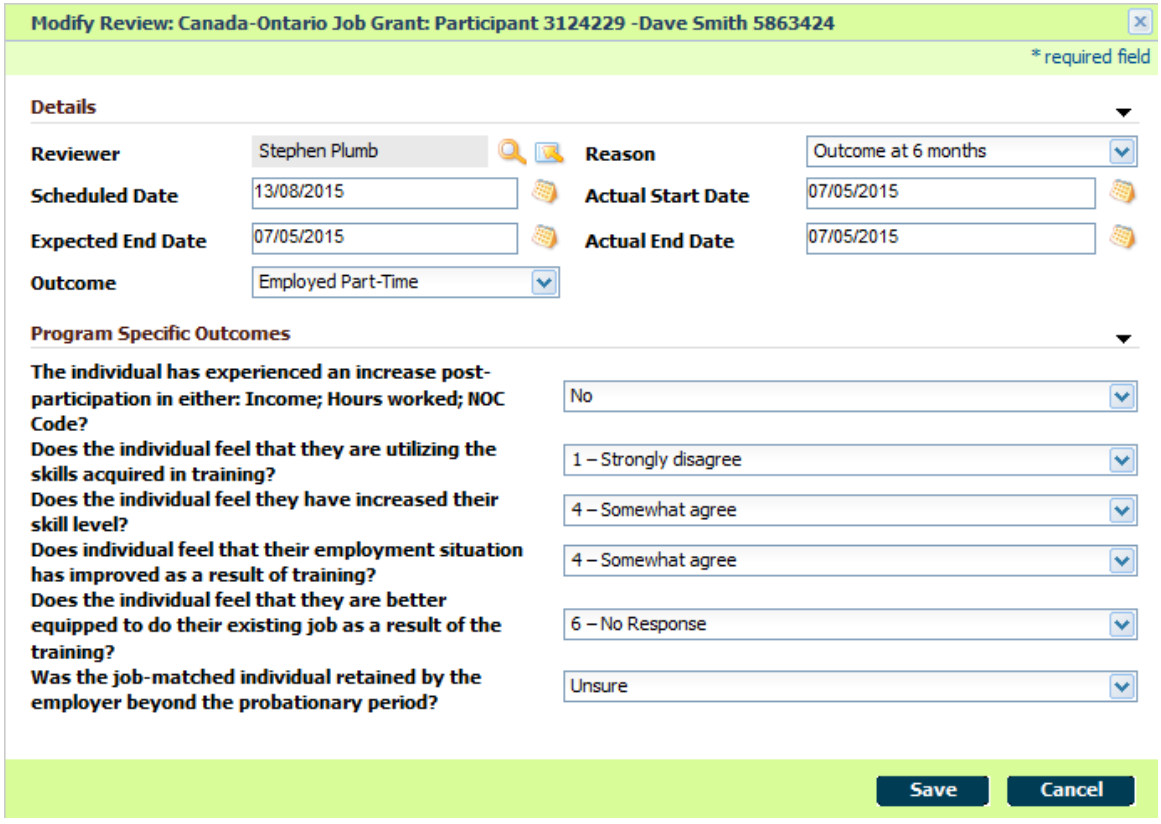
➲ Step 3: *View Review*

From the **Action Button**, click Edit.


Case Search
Pending Reviews
View Review: Canada-Ontario Job Grant: Participant 3124229 -Dave Smith 5863424
Edit
View Education
View Employment
Close
Details
Reviewer
Stephen Plumb
Scheduled Date
13/08/2015
Expected End Date
Outcome
Reason
Outcome at 6 months
Actual Start Date
Actual End Date
Review Type
System Created
Program Specific Outcomes
The individual has experienced an increase post-participation in either: Income; Hours worked; NOC Code?
Does the individual feel that they are utilizing the skills acquired in training?
Does the individual feel they have increased their skill level?
Does individual feel that their employment situation has improved as a result of

➲ Step 4: *Modify Review*

Modify the necessary information, and click Save. For system generated reviews, the **Reason** cannot be modified and the system will display an error message at the top of the page.


Modify Review: Canada-Ontario Job Grant: Participant 3124229 -Dave Smith 5863424
* required field
Details
Reviewer
Stephen Plumb
Scheduled Date
13/08/2015
Expected End Date
07/05/2015
Outcome
Employed Part-Time
Reason
Outcome at 6 months
Actual Start Date
07/05/2015
Actual End Date
07/05/2015
Program Specific Outcomes
The individual has experienced an increase post-participation in either: Income; Hours worked; NOC Code?
No
Does the individual feel that they are utilizing the skills acquired in training?
1 – Strongly disagree
Does the individual feel they have increased their skill level?
4 – Somewhat agree
Does individual feel that their employment situation has improved as a result of training?
4 – Somewhat agree
Does the individual feel that they are better equipped to do their existing job as a result of the training?
6 – No Response
Was the job-matched individual retained by the employer beyond the probationary period?
Unsure
Save
Cancel

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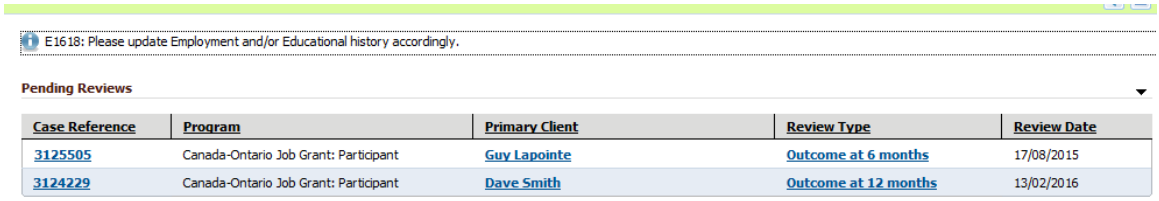
➲ Step 5: *View Review*

If completed, the system will advise the user to update employment and education history accordingly and provides links to **View Education** and **View Employment**.



	If a review needs to be removed, the **Reason** can be set to “Opened in Error.” This will ensure that it is filtered out of the relevant reports.

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8.18 Appendix

8.18.1 Plan Item Cost

An estimated and actual cost can be maintained for a plan item. The estimated cost is the cost an organization expects to pay for the delivery of a service associated with a specific type of service plan item. The actual cost of a plan item is the amount paid by an organization to deliver the service associated with the plan item.

8.18.2 Expected Outcome

An expected outcome is the desired result of a plan item activity. For example the expected outcome of a Placement with Incentive could be Employment. As part of the outcome-based approach to service planning, at least one expected outcome must be selected for each plan item.

8.18.3 Good Cause

Good cause is an acceptable reason why a plan participant did not achieve the expected outcome of a plan item (e.g., “Certified Illness”).

8.18.4 Statuses

8.18.4.1 Service Plan Status

There are three types of service plan statuses: service plan status, plan summary status, and plan item status. Service plan and contract status are used to measure the status of the plan and the level of agreement between the organization and the client. Plan item status, on the other hand, is used to track the actual progress of activities within the plan. All three of the statuses change throughout the delivery of a service plan.

The following is a description of each service plan status:

Open – the status is “open” when a service plan is created.

Submitted – the status is “submitted” when the service plan is submitted for approval and is not automatically approved.

Approved – the status is “approved” when it is approved automatically or by an authorized user. If the service plan is rejected, the status returns to “open.”

Active – the status is “active” when a contract has been issued in respect of the service plan and accepted by the plan participant.

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Closed – the status is “closed” when the service plan is manually closed by an authorized user.

8.18.4.2 Plan Summary Status

A plan summary has a status of “issued” when first created. A plan summary with this status is pending agreement between the relevant parties. The outcome of this agreement will change the plan summary status, and potentially the service plan status. A plan summary can either be “Accepted,” “Rejected,” or “Cancelled.” If rejected or cancelled, the service plan status is unaffected. If accepted, however, the service plan status becomes “active.”

8.18.4.3 Plan Item Status

A plan item's status changes as the plan item progresses. Plan items which have been configured to require approval will pass through additional stages as part of this approval process. The following is a description of each plan item status:

Unapproved – used when plan items requiring approval are added to a service plan.

Submitted – used when an unapproved plan item is submitted for approval.

Not Started – used before a plan item is activated. Plan items which do not require approval will have a status of 'Not Started' when first created. Plan items requiring approval will have this status after they have been approved.

In Progress – used when an actual start date is recorded. Once in progress, the plan item is considered activated.

Completed – used when an actual end date is recorded.

8.18.5 Service Plan Outcomes

Service planning allows organizations to assign outcomes to service plans and service plan elements. The process of assigning outcomes starts with the recording of an expected outcome for each plan item. On completion of that plan item, an actual outcome of “attained,” “not attained,” or “cancelled” is recorded. Once an actual outcome has been recorded for each plan item, the outcome for the related sub-goal(s) can then be entered.

The service plan outcome is recorded when the outcomes for all sub-goals have been entered. This outcome defines whether or not the desired outcome of the service plan has been attained.

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8.18.6 Service Plan Closure

A service plan is usually closed once all activities have been completed, but it can be closed at any time during its delivery. A closed service plan can still be accessed from the integrated case to which it was added.

8.18.7 Cost

Tracking the cost of a product or service is an essential part of service plan management. Plan item cost can be derived from the actual cost of delivering a plan item as entered by a caseworker.

A cost statement can be generated at any stage of the service plan delivery. It displays all estimated and actual costs involved in the delivery of a service plan at the time the statement is created. For each element, the statement provides an estimated and actual cost, which allows for the comparison of these costs. The costs of the sub-goals, plan groups, and the overall plan are derived from the accumulated cost of the individual plan items.

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